

***FINAL MEMO
FOR URBAN STORMWATER WORK GROUP APPROVAL***

**Recommended Methods to Verify Stream Restoration
Practices Built for Pollutant Crediting
in the Chesapeake Bay Watershed**



Submitted By:
Stream Restoration Group 1: Verification

Josh Burch, Scott Cox, Sandra Davis,
Meghan Fellows, Kathy Hoverman, Neely Law,
Kip Mumaw, Jennifer Rauhofer, Tim Schueler and Rich Starr

A Report to the Urban Stormwater Work Group

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A group of experts was formed last year to recommend methods for verifying the pollutant reduction performance of individual stream restoration projects built to meet the Chesapeake Bay TMDL (USWG, 2018). The group met five times and developed the consensus recommendations that are outlined in this technical memo. The memo is organized as follows:

1. Group Charge and Roster
2. Background on Urban BMP Verification
3. Key Adaptations for Stream Restoration Practices
4. Recommended Field Inspection Methods
5. Visual Indicators to Define Functional Performance
6. Thresholds for Defining Management Actions
7. Standards for Post-Construction Project Documentation
8. Sample Databases for Tracking and Verifying Projects
9. Suggested Environmental Assessment Resources
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Technical Appendices

- A. Template for Chesapeake Bay Nutrient Removal Credit Verification
- B. Spreadsheet for Storing Data from Rapid Stream Monitoring Protocol
- C. Example of Project Monitoring/Maintenance Plan
- D. Fairfax County Stream Restoration Scorecards

Section 1 Group Charge and Roster

The expert panel report on stream restoration practices was completed prior to the adoption of BMP verification requirements (USWG, 2014 and CBP, 2014). Given the large number of projects constructed since then, there is a critical need for more detailed guidance on how to verify them.

This need has been reinforced by several recent reports and memos developed within the Bay stream restoration community (CSN, 2018a and Wood et al 2018). The charge and membership of a special group to recommend improved guidance was approved by both the Urban Stormwater Work Group and the Stream Health Work Group earlier in the year (USWG, 2018).

The group was charged to recommend general guidance on how the private and public sector can verify stream restoration projects in the Chesapeake Bay watershed. More detail on the charge is summarized below:

1. Define what constitutes an adequate post-construction document for stream restoration projects, who is qualified to do them, and how they are to be used for verification purposes going forward.
2. Decide what, if any, quantitative data collected during project assessment and design should be retained to assist in future verification efforts.

3. Establish visual indicators that can rapidly determine whether an individual stream restoration project is still performing the water quality functions it was originally designed for.
4. Decide whether the condition and quality of the post-construction riparian and floodplain plant community still meets its project objectives over time.
5. Define specific thresholds for project failure that trigger the need for either (a) project repair, (b) follow-up forensic reach investigations or (c) or partial or complete loss of pollutant reduction credits.

Table 1 presents the roster for the group.

Table 1: Membership of Group 1 (Verification)		
<i>Name</i>	<i>Affiliation</i>	<i>E-mail</i>
Rich Starr	Ecosystem Planning and Restoration	rstarr@eprusa.net
Kathy Hoverman	KCI	Kathy.hoverman@kci.com
Tim Schueler	Hazen and Sawyer	tschueler@hazenandsawyer.com
Kip Mumaw	Ecosystem Services	kip@ecosystemsolutions.us
Neely Law	Center for Watershed Protection	nll@cwpl.org
Meghan Fellows	Fairfax County, DPWES	meghan.fellows@fairfaxcounty.gov
Sandra Davis	US Fish and Wildlife Service	Sandra_davis@fws.gov
Jennifer Rauhofer	SMC	jr@mdswm.com
Josh Burch	District of Columbia DOE	Josh.burch@dc.gov
Scott Cox	Pennsylvania DEP	sccox@pa.gov
<i>Group Facilitators:</i> Tom Schueler and David Wood. Chesapeake Stormwater Network		
<i>Special Thanks:</i> Kinsey Hoffman and Cassie Frye (Hazen) for their contributions to this memo		

Section 2 Urban BMP Verification in the Context of the Bay TMDL

The Chesapeake Bay Partnership endorsed a policy that all urban BMPs must be verified in the field to ensure they are still earning their pollutant reduction credit towards the Bay TMDL (CBP, 2014). Verification is needed to ensure that the practices used for pollutant reduction credit in the Bay:

- (1) actually exist
- (2) are working as intended, and
- (3) are maintained properly over their design life.

The broad details of urban BMP verification have been agreed to by the CBP Partnership (USWG, 2014). Each expert panel has recommended a maximum credit duration for each class of BMPs (see Table 2).

The credit duration can be renewed if the BMP is inspected using visual field indicators that confirm the practice is still providing its designed water quality function. Individual states have the responsibility, however, to develop more specific procedures to verify BMPs used for removal credits.

Table 2: Credit Duration Depends on Urban BMP Type	
<i>Urban BMP</i>	<i>Credit Duration (years)</i>
Stormwater Retrofits	10
New LID Practices	10
Individual Nutrient Discharges	10
Residential Stewardship Practices	5
Urban Nutrient Management Plans	3
Street Cleaning	1
Stream Restoration Practices	5
<i>Source: USWG (2014) and individual EPRs</i>	

General Verification Requirements for Stream Restoration Projects

The urban stream restoration expert panel outlined the broad requirements for verifying reduction credits for individual projects (USR EP, 2013). Further guidance on BMP verification was subsequently approved by the USWG (2013) and specific guidance for stream restoration practices was developed by CWP (2014).

The expert panel acknowledged that most restoration projects undergo monitoring for several years after construction, based on required state and federal permit conditions. Once the original permit expires, however, the panel offered no specific guidelines on how to verify project performance going forward. They did suggest that:

- The installing agency needs to conduct visual inspections once every 5 years (after the original permit conditions expire) to ensure that individual projects are still capable of removing nutrients and sediments.
- The duration of the credit is shorter than other urban BMPs, since these projects are:
 - subject to catastrophic damage from extreme flood events
 - already have requirements for 3 to 5 years of post-construction monitoring to satisfy permit conditions
- If a project does not pass inspection, sponsors have one year to take corrective action before credit is lost.

Some typical requirements for verifying stormwater retrofit and stream restoration practices are compared in Table 3:

Table 3: Typical Verification Requirements
for Stormwater Retrofit and Stream Restoration Projects ¹

<i>Factor</i>	<i>Stormwater Retrofits</i>	<i>Stream Restoration</i>
<i>Verification Authority</i>	Legal maintenance agreements w/ owner and MS4 permit	Project permit condition and Bay TMDL reporting agency
<i>Credit Duration</i>	10 years	5 years
<i>Field Inspection</i>	Yes, required under MS4 Permit	Not currently required after construction permit expires
<i>Inspector Qualifications</i>	Trained field techs w/ engineer oversight	Not yet defined, but an approach proposed in this memo
<i>Visual Indicators?</i>	Yes	
<i>As-Builts?</i>	Yes	
<i>Required Record Keeping?</i>	Location, plans, past inspections,	Maintain project files, but no other details provided
¹ General comparison only, actual requirements vary among different Bay jurisdictions		

Section 3 Key Principles for Stream Restoration Verification

This section outlines some key principles for how stream restoration projects should be inspected in the Chesapeake Bay watershed in order to verify stream restoration credits. The principles are intended to meet the following objectives:

1. Craft a technically sound field method to assess whether stream restoration projects continue to perform their pollutant reduction function of over time.
2. Account for inherent differences in restoration design approaches (e.g., NCD, RSC, LSR) and the three crediting protocols, as they are actually applied to individual restoration projects.
3. Establish, going forward, an industry standard for post- construction drawings and/or surveys that can provide critical benchmark data on what should be inspected within the project reach to verify individual stream restoration projects.
4. Develop a rapid, consistent and repeatable method to inspect visual indicators within a project reach to determine whether it is still meeting its water quality function.
5. Provide numeric triggers that define management actions needed to restore project function (e.g., reach passes, is compromised or fails). The triggers, in turn, prompt subsequent project investigations to confirm, reduce or eliminate the original pollutant reduction credit.
6. Enable a two-person crew to inspect a thousand-foot project reach in less than four hours (including time spent on documentation and reporting).

7. Be developed in an inclusive process that involves stakeholders across the stream community, including regulators, project sponsors, practitioners, researchers, watershed advocates and others.
8. Provide useful data to inform the design and increase the longevity of future stream restoration projects so that we can generally learn from our mistakes and reinforce our successes.
9. Impose reasonable and predictable costs for project sponsors that are consistent with those used to verify other urban BMPs.
10. Provide managers with data on how to adaptively manage future stream restoration projects to achieve more reliable pollutant reduction and ecosystem service enhancement.

Section 4 Recommended Inspection Approach

Important Caveat: While the group recommends methods to effectively verify stream restoration practices, state and federal agencies have the discretion to modify them to meet their unique regional, environmental or regulatory conditions.

The group acknowledges that typical urban stream dynamics are such that some design elements within a project reach may adjust or even become compromised over time. These minor changes do not necessarily mean, however, that the entire water quality benefit is lost. Indeed, urban streams experience some “natural” rate of movement, which varies based on the type of stream, its physiographic region, intensity of past watershed development and presence of any legacy sediments. The existing crediting protocols were intentionally designed to be conservative to reflect a certain amount of project adjustment over time.

The basic approach for inspecting stream restoration projects follows the general BMP inspection model developed for bioretention (Scott et al, 2013) and stormwater ponds (Lucas et al, 2016). The approach includes the following elements:

Focus on the dominant protocol in the project reach. If more than one crediting protocol is used on a project, the protocol that provides the greatest contribution to overall nutrient reduction in the project reach should be the major focus, (although more than one protocol may be needed in more complex projects).

A two-stage inspection process is utilized. The first stage involves a rapid inspection of the project reach to assess BMP condition. Projects are graded on a pass/action needed/fail basis. The guiding rule is that inspectors are looking for significant departures from its original design that may be compromising pollutant reduction function. Should a project appear to fail, a second forensic inspection is undertaken to diagnose the nature and cause(s) of the problem, and whether project functions can be recovered by additional work.

Trained field technicians rely on simple indicators along the reach to rapidly assess project function in the first stage. The list of indicators is relatively short and emphasizes conditions that are easy to observe (e.g., exposed earth on banks, deep channel incision, etc.) and can be consistently interpreted in the field (see Section 5).

In most cases, the field technicians take geo-referenced photos to document problems for quality control purposes. In general, the field technicians will take channel or bank measurements as needed, with locations based on field judgement, plan review or at any pre-selected control stations or monumented cross-sections shown on the plans (see Section 7).

Numeric failure thresholds for the reach. After initially determining the proportion of the project reach that may be compromised, the field technicians compare their outcomes to numeric thresholds that may predict unacceptable project failure (see Section 6). If project failure is found to be a possibility, then a second forensic investigation by a more experienced stream restoration professional may be needed to confirm the diagnosis.

The quality of inspections is greatly improved when inspection crews have access to good documentation on the original project construction. Good post construction documents identify critical areas where future problems might be expected and show control sections, photo stations or monuments along the project reach where key project changes can be reliably measured (e.g., bank height, bank stability, condition of the hyporheic box or reconnected floodplain). Some potential standards for post-construction project documents are provided in Section 7.

Remote unmanned aircraft (drones) could potentially be a valuable inspection tool to help measure visual indicators along a project reach, however, inspection protocols and interpretation have not yet been satisfactorily tested.

Section 5 Indicators to Define Functional Performance

The basic field verification approach utilizes a two-stage inspection process.

The first step involves a rapid inspection of the project reach to assess its condition, relying on simple indicators, as shown in Tables 4 to 6. The basic approach is to walk the entire project reach to assess the dominant restoration crediting protocol. The rapid initial inspection is intended to look for any potential loss of pollutant reduction function in some or all of the project reach.

The guiding rule is that inspectors are looking for departures from the original design that could possibly compromise pollutant reduction functions. While minor problems are noted for future re-inspection or maintenance, they are not the primary focus of the verification assessment.

Some photos that show what failing visual indicators for Protocol 1 look like can be found in Figure 1.

Table 4 Defining Loss of Pollutant Reduction Function for Protocol 1 (Prevented Sediment)	
Criteria for Loss	Key Visual Indicators
Evidence of bank or bed instability such that the project delivers more sediment downstream than designed, as defined by exposed soils/fresh rootlets	<ul style="list-style-type: none"> • Bank erosion (e.g., exposed bare earth or undercutting bank) • Departure of more than 20% from average post-construction design bank height ¹ • Incised channel, as indicated by loss of defined pools and riffles and/or presence of an active head cut • Flanking or scour of in-channel structures • Failure or collapse of allowable bank protection practices • Less than 80% ground or canopy cover in the restoration zone ²
¹ as measured at riffles from the project as-built drawing, preferably from pre-designated control sections established at its most vulnerable locations ² depending on the long-term vegetative community objectives established for the project, may be expressed as a measure of exposed surface soil (>20%) or canopy cover (<80%)	

Table 5 Defining Loss of Nitrogen Reduction Function for Protocol 2 (Denitrification in the Hyporheic Box)	
Criteria for Loss	Key Visual Indicators
Evidence that the reach is no longer fully meeting the design assumptions for expanding the hyporheic box (such as when channel incision reduces access to hyporheic zone)	<ul style="list-style-type: none"> • Departure of more than 20% from average post-construction design bank height ¹ • Observable aggradation in streambed (as measured by embeddedness, loss of riffles or bed heterogeneity or excessive deposition, such as lateral and mid-channel bars) • Less than 80% ground or canopy cover ² found in the project's designed hyporheic zone ³ • Stream de-watering (lack of any observable baseflow in the stream channel)
¹ as measured at riffles from the project as-built drawing, preferably from pre-designated control sections established at its most vulnerable locations ² depending on the long-term vegetative community objectives established for the project, may be expressed as a measure of exposed surface soil (>20%) or canopy cover (<80%) ³ usually a short distance from the edge of the stream to the top of bank (and occasionally extending into the floodplain). The location of the transects are typically shown on the as-built or project monitoring plan	

Table 6 Defining Loss of Pollutant Reduction Function Loss for Protocol 3 (Floodplain Reconnection)	
Criteria for Loss	Key Visual Indicators
Channel incision or floodplain sediment deposition increases effective bank height, thereby reducing intended annual stream flow volume diverted to floodplain	<ul style="list-style-type: none"> • Departure of more than 20% from average post-construction design bank height ¹ or presence of active head cuts • Features used to divert flows to or from floodplain are obstructed and no longer work • No evidence of floodplain retention, as signified by a lack of sediment deposition, terraces, wrack-lines or leaf clumps in floodplain • Unable to meet intended wetland or tree canopy cover targets with the project floodplain ²
<p>¹ as measured at riffles from the project as-built drawing, preferably from pre-designated control sections established at its most vulnerable locations.</p> <p>² measured from the edge of the stream across the reconnected portion of the floodplain, as shown in the as-built drawing or project monitoring plan. Cover is expressed as the fraction of exposed surface soil in the designed habitat area, and if the designed vegetative community allows for it, tree canopy cover.</p>	

Figure 1: Visual Indicators Showing Failures in the Field for Protocol 1

	
<i>Exposed Soil on Banks</i>	<i>Extreme Undercutting</i>
	
<i>Outflanking of Instream Structures</i>	<i>Bank Armoring Collapse</i>
Photo sources: Tim Schueler and Josh Running	

Project Fieldwork for Protocol-Specific Rapid Verification Inspections

The next step is to rapidly determine the proportion of the project reach that is compromised, based on the visual indicators. Each of the protocols has its own unique work flow to inspect and verify the stream restoration project (Figures 2 to 4).

Protocol 1 Field Work: As shown in Figure 2, the project reach is walked in an “out and back” manner. In the “out” leg (Step 1), the crew rapidly assesses the visual indicators established for Protocol 1, and temporarily flags any location where more detailed measurements need to be taken.

If problems are encountered, more detailed measurements are taken in the “back” leg of Step 2. The crew may measure bank height, exposed soil cover, tree canopy cover or the linear extent of any problem areas (e.g., eroding bed or banks). Photos are taken to document any suspected problem areas and at any pre-defined cross-sections or stations shown on the project drawings.

Protocol 2 Field Work: The rapid survey uses the same general “out and back” method used for protocol 1, but emphasizes the condition of the hyporheic box within the project limits (Figure 3). The crews:

- Inspect riffles for indicators that show diminished streambed quality
- Measure current bank height at pre-designated stations shown on project as-built or project monitoring plan.
- If no stations are designated, then geo-document the desired bank height measurement.

The general rule is to inspect the box from edge of stream to top of bank about every 100 to 200 feet of channel riffles. Shorter projects may need to inspect the box over shorter intervals (e.g., 50 ft).

Protocol 3 Field Work: The rapid survey combines the same “out and back” reach assessment with an inspection of the reconnected or restored floodplain within in the project limits (Figure 4). Spot checks may also be conducted across the floodplain to confirm the reconnection and assess its visual indicators. The crew may also choose to assess Protocol 2 indicators to determine if channel incision is compromising the project.

Project Fatal Flaws: Should a potential “fatal project flaw” be discovered during any inspection leg, the field technicians should document it with geo-referenced photos and share them with a more experienced stream assessor. The group defined a fatal flaw as a “systematic problem that does not trigger failure now, but could potentially compromise the entire reach in the near future.”

If the stream assessor concurs that the reach appears to be compromised or contains a fatal flaw, they can return to the site to conduct a second, more in-depth forensic inspection to determine what additional work may be needed.

Figure 2:
Fieldwork for Inspecting Projects to Verify Protocol 1 Performance

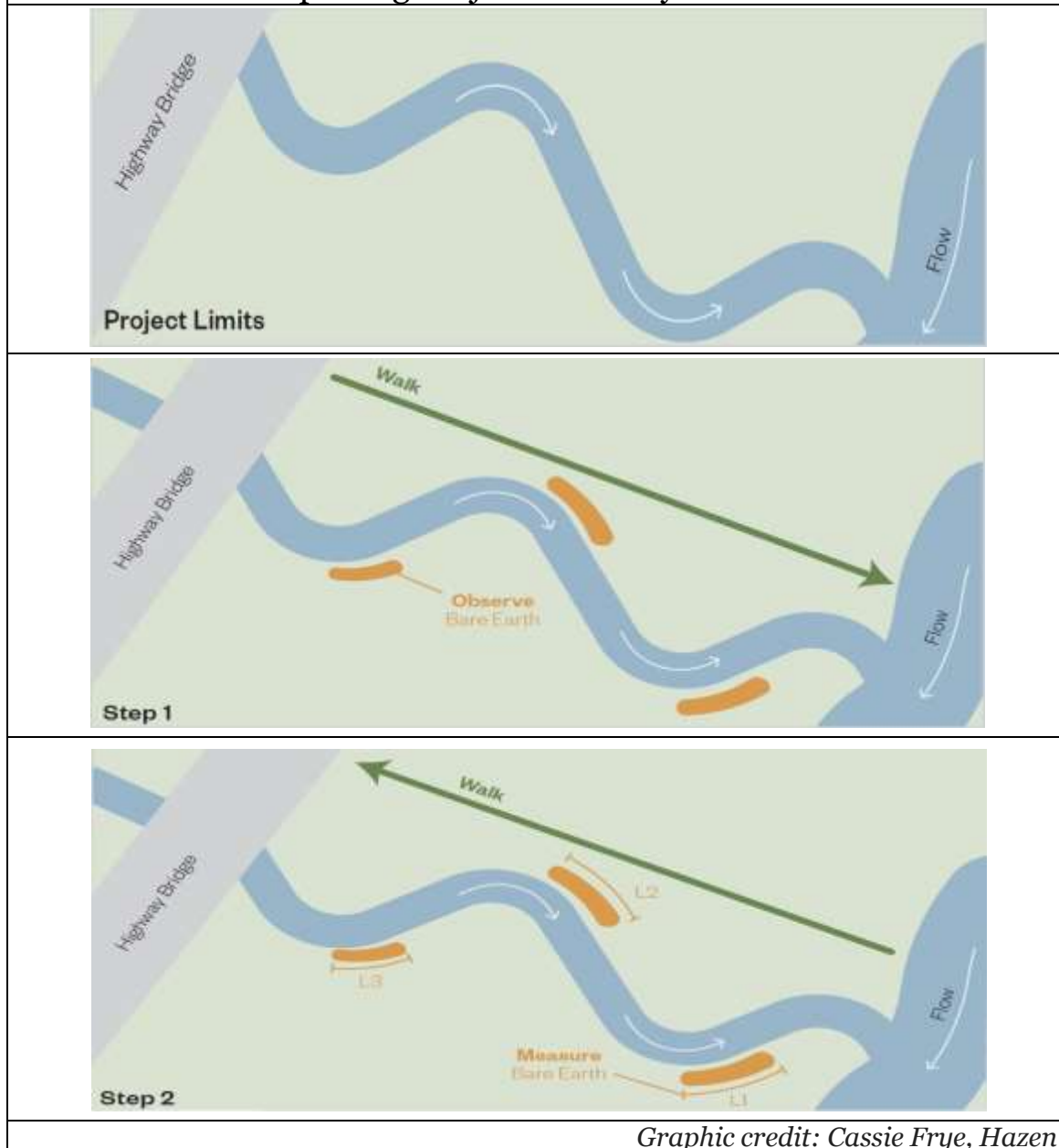
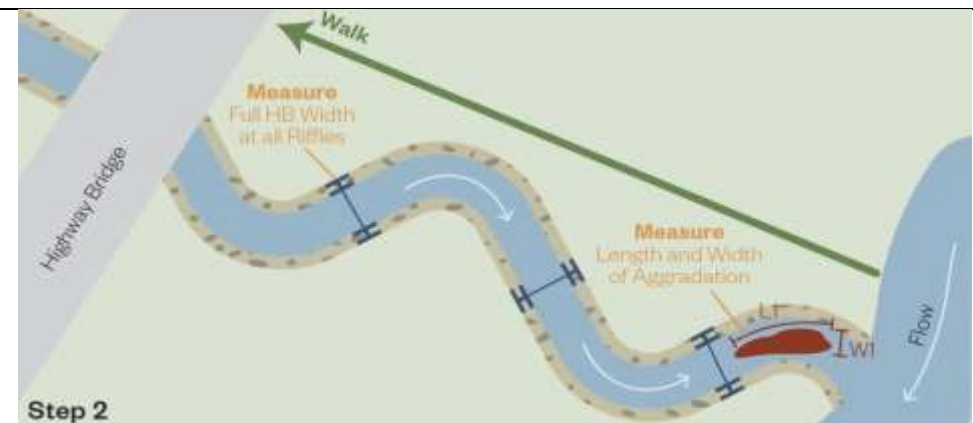
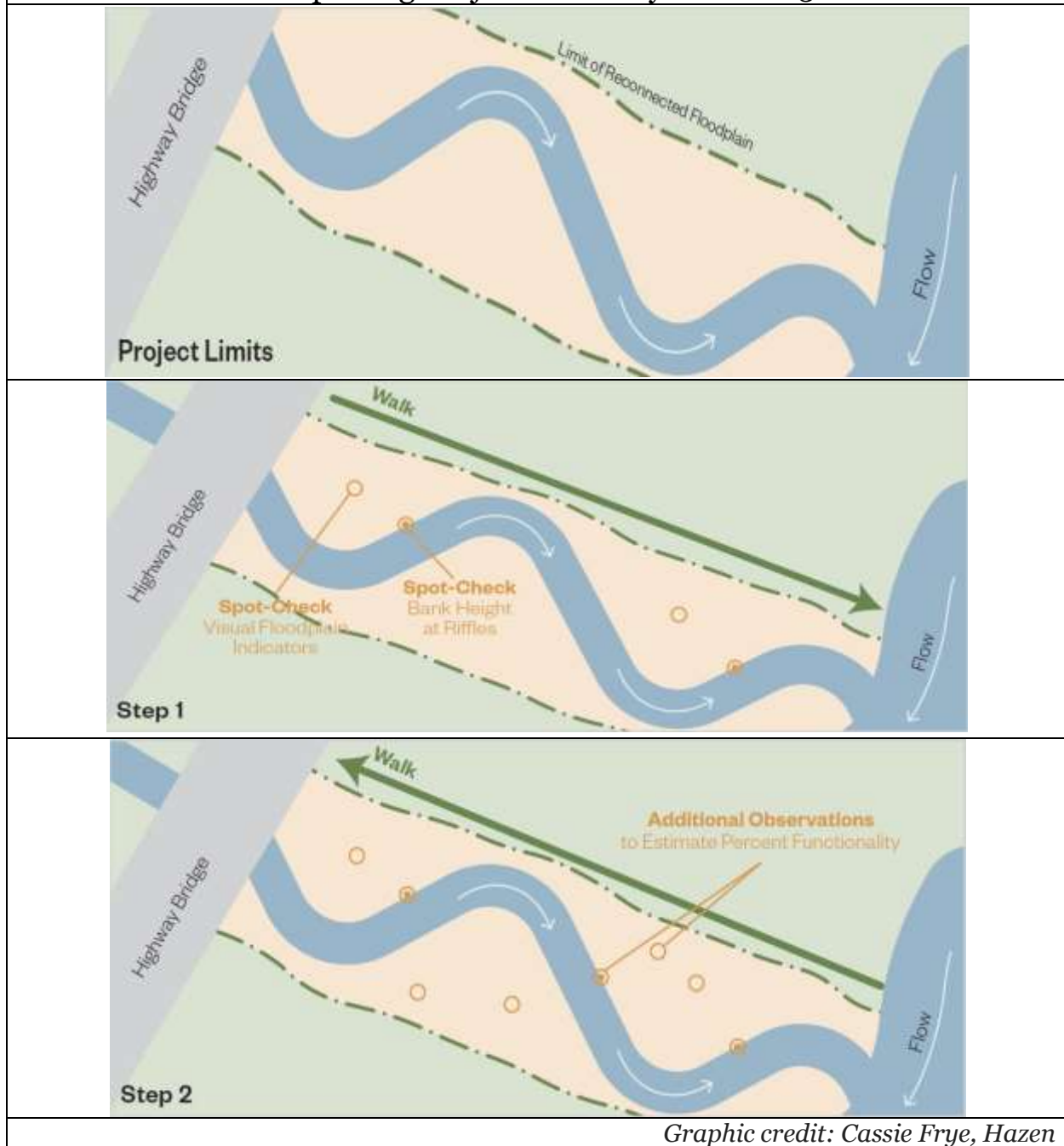


Figure 3:
Fieldwork for Inspecting Projects to Verify Protocol 2 Performance



Graphic credit: Cassie Frye, Hazen

Figure 4:
Fieldwork for Inspecting Projects to Verify Protocol 3 Performance



Graphic credit: Cassie Frye, Hazen

Section 6: Thresholds for Defining Management Actions

The project is analyzed to determine if the degree of change, relative to the original design, is severe enough to warrant management action (Table 7). All stream restoration projects fall into one of three possible categories:

1. Functioning (Pass)
2. Showing Major Compromise (Action Needed)
3. Project Failure (Fail)

Table 7: Framework for Relating Reach Conditions to Management Decisions			
<i>Status</i>	<i>% of Failing Project Reach</i>	<i>Inspections</i>	<i>Management Actions</i>
<i>Functioning or Showing Minor Compromise</i>	0 to 10%	Re-inspect in 5 years	None Needed Credit Renewed for 5 Years
<i>Showing Major Compromise</i>	20 to 40%	Conduct immediate forensic investigation to identify cause(s)	Do project maintenance and repairs, as warranted
<i>Project Failure</i>	50% or more	Lose credit and abandon the project or reconstruct a new stable channel	

The group deliberately made the categories non-overlapping so there would be room to judge the entire system as a whole. For example, if a project falls between categories (e.g., 15%), professional judgement is needed to answer the question of whether the project is trending toward or away from stability, thereby pushing the project into a lower or higher failure category.

Qualified stream professionals are encouraged to provide quality control on all rapid inspection results done by field technicians, and always when a project falls between failure thresholds.

The group did not categorically define the term “qualified stream professional” needed to perform quality control and any subsequent forensic investigations, leaving this decision to the project owners/sponsors.

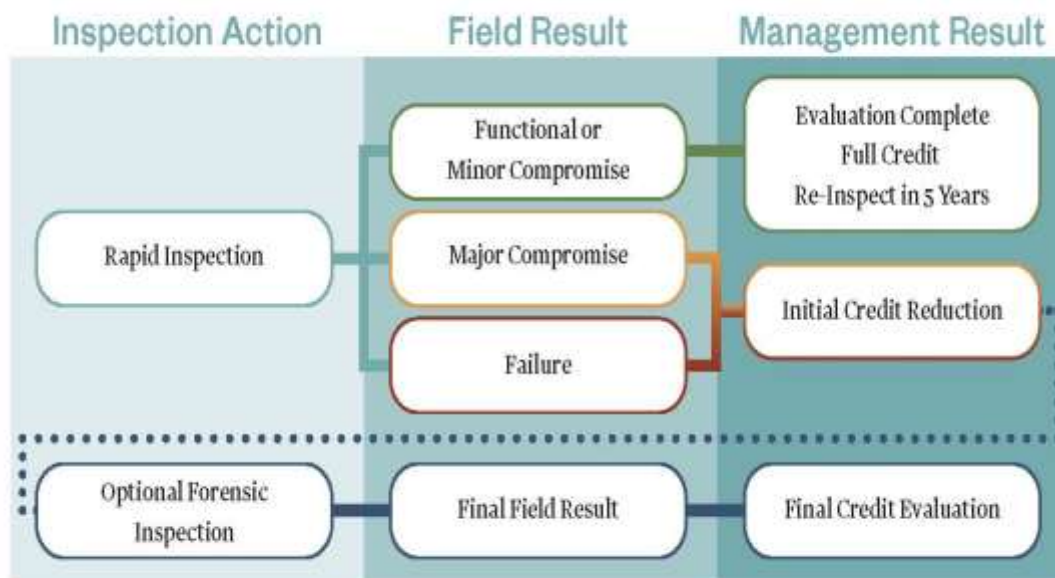
In general, stream professionals consist of knowledgeable consultants, applicable review agency staff, engineers, ecologists, biologists or other suitable experts. Person or teams serving in this role are encouraged to identify their qualifications in a simple, straight forward manner and attest they have personally reviewed the site conditions and project construction documents.

The method for calculating the percentage of the project reach in poor condition for each protocol is described in Table 8.

Table 8 Examples of how Percent Failure is Defined Along a Project Reach for Each Protocol		
Protocol 1	Protocol 2	Protocol 3
A. Define Restored Banks Over Reach Length¹	A. Define Hyporheic Zone Over Reach Length²	A. Define Area of Reconnected Floodplain³
<i>Example: 1000 ft reach has 2000 LF of restored banks</i>	<i>Example: 1000 ft reach has 400 LF of reconnected hyporheic zone, both banks would be 800 LF</i>	<i>Example: 1000 ft reach has reconnected floodplain on right bank by an additional 10 ft, and additional 20 ft on the left bank = 30,000 ft²</i>
B. Estimate Total Impaired Reach Length, for all indicators ⁴	B. Estimate Length of Impaired Hyporheic Zone, for all indicators ⁵	B. Estimate Length/Area of Diminished Connection ⁶
<i>Example: 100 ft of right bank and 50 ft of left bank are compromised, for a total of 150 ft</i> <i>(150/2000=7.5%)</i>	<i>Example: 100 ft of tight bank and 300 ft of left bank are compromised, for a total of 400 ft</i> <i>(400/800 = 50%)</i>	<i>Example: 300 LF of right bank and floodplain have washed out and are now exposed soil (3000/30,000 =10% of floodplain and 300/2000 = 15% of stream) Total = 25%</i>
C. Compute Percent Function Loss Over Reach⁷ and Compare to Decision Thresholds		
<i>Example: Functioning or showing minor compromise</i>	<i>Example: Project failure</i>	<i>Example: Showing major compromise</i>
Notes: ¹ Restored bank length can be up to two times greater than the restored reach length ² Length of the hyporheic box along the channel from its initial disconnection extending downstream until connection is resumed, excluding bedrock sections, per design. ³ Area of floodplain with new or increased reconnection with the channel, per design ⁴ Calculated by dividing estimated linear feet of eroding/bare earth by the linear feet restored banks (e.g., 400 feet of eroded bank observed over a 1,000 feet restoration project would be 400/2000=20%). ⁵ Done in the same general manner as Protocol 1 ⁶ Can be measured as % bank height length exceeding design tolerances or % floodplain area not vegetated or otherwise connected ⁷ The workgroup selected the minimum (10%) threshold using its knowledge of typical pre-restoration channel condition and assuming a 50% (default) post-restoration load-reduction. Specifically, the workgroup determined that restoration is very unlikely unless at least 20% of a reach, measured linearly, was eroding. Pre-restoration reaches containing less than 20% erosion would be incorrectly verified using the 10% post-restoration threshold and the 50% default reduction, in the absence of lower post-restoration banks and/or lower lateral erosion rate (Source; Scott Cox, PADEP).		

If the rapid reach assessment indicates the potential for loss of credit, the owner or project sponsor can respond with several management decisions as shown in the flow chart presented in Figure 5.

Figure 5: Flow Chart Relating Inspection Results to Management Actions



Section 7 Standards for Post-Construction Project Documentation

Better project documentation is essential to support future verification efforts for stream restoration practices. In general, project sponsors usually require one of three kinds of construction documentation, depending on the era in which the project was constructed:

1. *Design Drawings:* projects without any sort of “as-built” or other construction documentation rely on original design drawings.
2. *“Red line”:* Copy of design plans w/ info pertaining to installation of actual work documented by the contractor, engineer, third party or some combination thereof.
3. *Professionally surveyed as-built:* Surveyor conducts a topographic survey for the completed project, tied to the original design datum
4. *Project monitoring plan:* a narrative plan that guide post-construction monitoring activity at individual restoration projects before and after its permit expires. For a good example, see Appendix C.

The original expert panel outlined some minimum record-keeping requirements for stream restoration projects (USR EP, 2013):

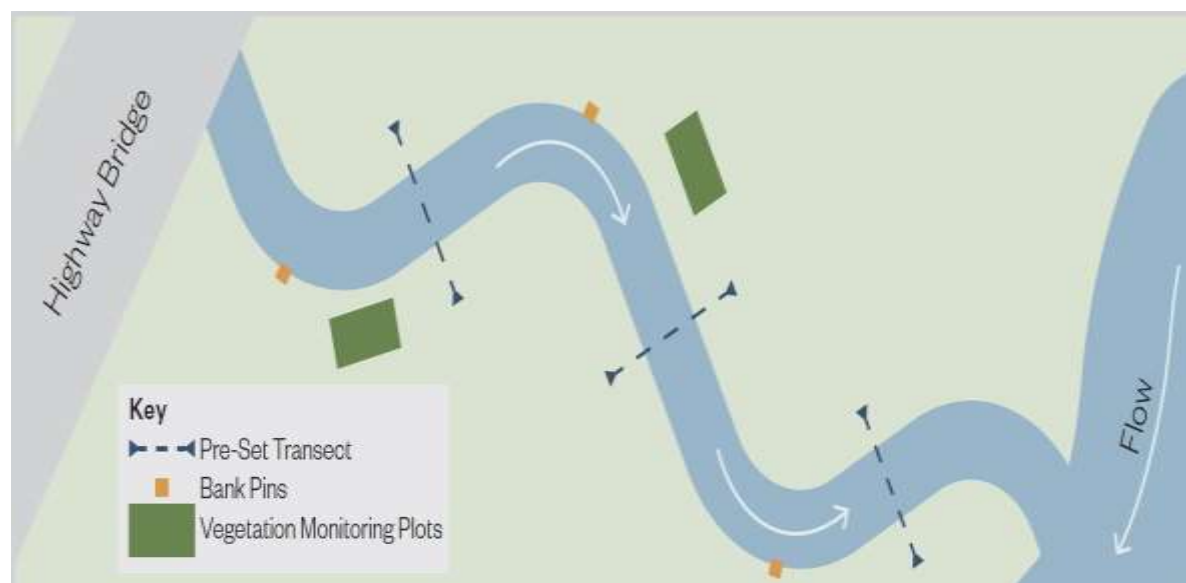
- “The installing agency should maintain an extensive project file for each stream restoration project installed (i.e., construction drawings, as-built survey, credit calculations, digital photos, post construction monitoring, inspection records, and maintenance agreement).

- The file should be maintained for the lifetime for which the load reduction will be claimed”

The group recommends adopting industry “best practice” standards for post construction plans and documents to support more rapid and cost-effective verification inspections in the future.

- Depending on the project design, all post-construction plans should clearly demarcate the following features:
 - Locations and extent of the restored banks and riffles
 - Design limits of the hyporheic box and/or reconnected floodplain, if used
 - Locations and elevations for bank height measurement stations
 - Any other locations for bank pins, random checks of floodplain or hyporheic box, or vegetative cover plots needed to evaluate the project (see Figure 6).
- Post-construction plans should identify fixed photo stations or cross-sections along the project reach. If possible, these should be monumented at reach locations to facilitate measurement. Designers should emphasize vulnerable reaches, if they occur, that are subject to high energy conditions or stream corridor project constraints.
- While it is desirable to focus on fixed sections, failure can occur at any point along a project reach. Consequently, it is important to inspect the entire project reach during this rapid stream assessment. Geo-referenced digital photos should be taken at all areas where problems are observed or suspected.
- The design objective(s) for each stream restoration project should be clearly and concisely referenced in project construction documents. This information provides future inspectors with a better sense of the goals and objectives that the project was intended to solve (especially when they are numeric or quantitative).
- Designers and owners should retain data on the original project design that can assist in future forensic investigations. Some examples might include BANCs data such as BEHI/NBS scores, channel plans, cross-section and profile views, and any groundwater or well data collected as part of the initial project assessment.

Figure 6: Concept of how key protocol data is shown on post-construction project plans



Section 8 Sample Tracking Systems to Verify Projects

The group agreed that it was important to establish good systems to track inspection data over time to make better management decisions for individual projects. Several examples drawn from the public and/or private sector show effective ways to keep track of stream restoration project data.

The first approach relies on a simple spreadsheet template to track critical points of potential vulnerability along the project reach. Appendix A documents how spreadsheets could be used to store and analyze inspection data for a typical project designed using any restoration protocols.

A second approach relies on parts of existing stream assessment tools, such as the Rapid Stream Restoration Monitoring Protocol (USFWS, 2014). Geomorphic and channel data collected as part of this rapid method can quantify several visual indicators. As with the previous method, a spreadsheet has been developed to track project assessment data collected using the rapid protocol (See Appendix B for a spreadsheet for managing stream assessment data).

The third approach involves a concise project monitoring and maintenance plan. A good example of a real-world stream restoration project plan is provided in Appendix C. The plan outlines the project goals and objectives, as well as the schedule, map and procedures for field monitoring and long-term maintenance.

The fourth approach involves an asset management system developed by Fairfax County, Virginia. Stream restoration projects are tracked by the public works maintenance division that already oversees other stormwater features (such as wet ponds, extended ponds, green infrastructure and outfalls). Easements are in place prior

to construction to have continued access and maintenance responsibility in perpetuity, especially for features that are not owned by the County.

Projects are tracked as built infrastructure and receive 5- year monitoring. Maintenance systems were developed for other stormwater assets and adapted for use for stream projects. Given the complicated nature of stream projects, the maintenance process was upgraded to a two-stage monitoring. With the first level monitoring being conducted by field staff to observe and document. No action decisions are made without further review by subject matter experts including ecologists, landscape architects, engineers and construction experts, which may or may not require additional measurement.

A simple reference card for each feature which includes many of the details outlined elsewhere, allow for ready access to project construction details. As-builts, planting plans and construction documents are also archived. A geo-referenced scorecard is housed in a GIS database will allow project tracking through time. The template for a stream maintenance score card is provided in Appendix D, as well as a prototype for an individual project.

Section 9 Suggested Environmental Assessment Resources

Long-term reach monitoring is often required as a permit condition (which can vary among state agencies) but no specific monitoring is currently required for purposes of Bay credit verification (i.e., after the construction permit expires and the stream restoration project has been accepted by the appropriate agency). Some recent research has shown that poorly designed stream restoration projects can have unintended consequences for some stream parameters, and may not always achieve desired levels of functional uplift.

The original expert panel strongly endorsed the need to show functional uplift for stream projects primarily built for pollutant reduction credit (USR EP, 2103). They generally recommended the stream function pyramid developed by Harman et al (2011) as the preferred method to define functional uplift for individual stream restoration projects (see Table 8). The panel, however, did not make any recommendations on the specific parameters or number of pyramid levels that should be sampled before and after projects are constructed. This omission has created some confusion among sponsors, designers and regulators as to what exactly is expected when it comes to post-permit project monitoring.

A Scientific and Technical Advisory Committee (STAC) workshop was held that developed a general framework for defining how functional uplift may be assessed for stream projects implemented for the Chesapeake Bay TMDL (Law et al, 2015). Key to assessing stream restoration project functional lift is understanding the project goals and objectives such that project expectations correspond with the intended project outcomes and the extent to which stressors impact stream health. For example, a project designed to address stressors affecting stream stability, higher level functional restoration may not be achieved.

The CBP Stream Health Work Group (SWHG) has defined a need to develop guidance to implement the recommendations of the STAC workshop that address this gap through the identification of practicable metrics to assess a full suite of stream functions, adding to those identified in this report. The intent of such guidance is look at individual projects at their potential to restore stream health, rather than singular functions. The verification group strongly endorses their efforts, particularly given how many hundreds of miles of stream restoration projects are currently in the pipeline.

Table 8 Recommended Stream Assessment Resources to Define Functional Uplift
<p><i>Some important resources include:</i></p> <p>Harman et al. 2011. A function-based framework for developing stream assessments, restoration, performance standards and standard operating procedures. U.S. Environmental Protection Agency. Office of Wetlands, Oceans and Watersheds. Washington, D.C.</p> <p>Starr, R., W. Harman and S. Davis. 2015. Function-based rapid stream assessment method. CAFÉ S-15-06. Chesapeake Bay Field Office. U.S. Fish and Wildlife Service. Annapolis, MD.</p> <p>See also further work by Starr et al (2015) and Starr and Harman (2016) and the US EPA Rapid Bioassessment Protocol (RBP)</p>

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Technical Appendices

Appendix A Template for Chesapeake Bay Nutrient Removal Credit Verification
Credit: Kinsey Hoffman (Hazen)

- Access: <https://drive.google.com/open?id=1C6aYs9Cj9-qxnkThxITORE9fAKxf4Bzw>

Appendix B Spreadsheet for Storing Rapid Stream Monitoring Protocol Data

- Access: <https://chesapeakestormwater.net/download/9498/>

Appendix C Example of Monitoring/Maintenance Plan (River Run SRP)

- Access: <https://chesapeakestormwater.net/download/9501/>

Appendix D Fairfax County Stream Restoration Scorecards

- Access (Part 1): <https://chesapeakestormwater.net/download/9505/>
- Access (Part 2): <https://chesapeakestormwater.net/download/9509/>