

What's The Score? Considerations for Developing Metrics and Indices

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Volunteer Water Quality Monitoring National
Facilitation Project

USDA-CSREES National Water Conference, Sparks NV

February 6, 2008



Used with permission of presenters at*

Got Data? Cool Tools for Effective Data Management

Friday, November 16th, 2007

EPA New England Regional Laboratory
11 Technology Drive, North Chelmsford, MA



* In particular: Jerry Schoen, Sue Flint, Tony Williams

A few definitions...

Environmental Parameter

- defining characteristic
- a measurement
- a test

Examples?

Temperature, pH, dissolved oxygen, nitrogen, phosphorus

Indicator

- measurable feature that provides *useful* evidence of system quality
- a sign, symptom or index of ...
- provides evidence of something else
- Something used to show visually the condition of a system

Examples?

Housing starts, fecal coliform, percent impervious surface

Useful bacterial indicators

- Present whenever intestinal pathogens are present
- Alive longer than the hardiest intestinal pathogen
- Found in a warm-blooded animal's intestines
- Analyzed with an easy testing method
- Directly correlated with the degree of fecal contamination
- Useful in fresh and marine waters

A few more definitions...

Metric

- a standard of measurement
- a measure of (a biological) attribute.
- an attribute with empirical change in value along a gradient of human disturbance.
- data analysis summary

Examples?

Biological

EPT
% Sensitive Diatoms
plant/animal condition

Chemical

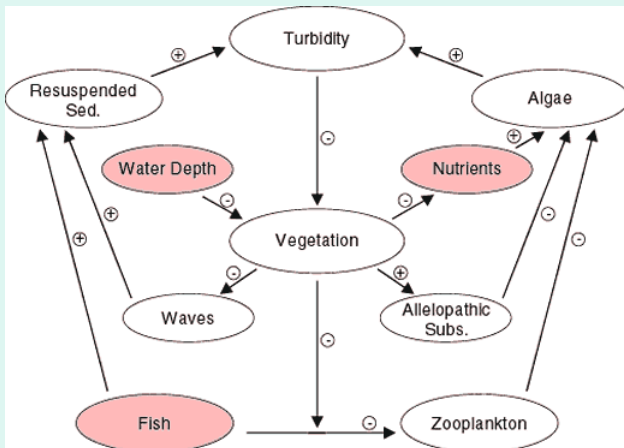
pH
Temperature
DO ppm or %Sat

Physical

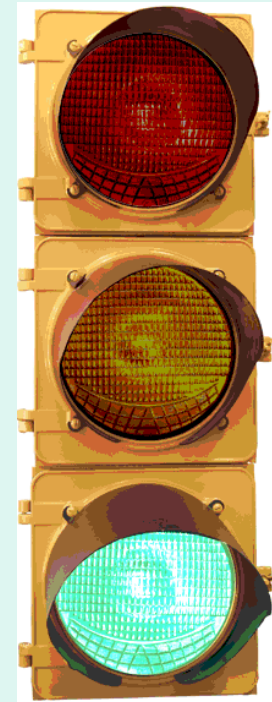
(river) channel length, sinuosity
(land use type) area, density

(Water Quality) Index

- An aggregated number used to judge condition (e.g. IBI, RBP, TSI, GDP)
- A summary of large amounts of information
 - simple terms (e.g., good, fair, poor)
 - consistent
 - easily understood by your audience (and you): consider the 3 P's



- Public,
- Policy makers,
- Politicians



Advantages of an index

- Represent a number of variables in a single number,
- Combine various measurements in different measurement units in a single metric
- Convey relative differences in water quality between sites (or at one site) over time
- Effective as a communication tool.

Disadvantages

- Not always easy to understand its basis
- Effect of missing parameters
- Components & weighting can be judgmental



Air Quality Index (AQI)

Air Quality Index Levels of Health Concern	Numerical Value	Meaning
Good	0-50	Air quality is considered satisfactory, and air pollution poses little or no risk.
Moderate	51-100	Air quality is acceptable; however, for some pollutants there may be a moderate health concern for a very small number of people who are unusually sensitive to air pollution.
Unhealthy for Sensitive Groups	101-150	Members of sensitive groups may experience health effects. The general public is not likely to be affected.
Unhealthy	151-200	Everyone may begin to experience health effects; members of sensitive groups may experience more serious health effects.
Very Unhealthy	201-300	Health alert: everyone may experience more serious health effects.
Hazardous	> 300	Health warnings of emergency conditions. The entire population is more likely to be affected.



Quality of Air Means Quality of Life

<http://airnow.gov/index.cfm?action=static.aqi>

AQI caveats:

How AQI Calculated:

Daily concentrations of major pollutants at many locations

- **ground-level ozone**
- **particle pollution**
- **carbon monoxide**
- **sulfur dioxide**
- **nitrogen dioxide**

formula used to convert raw values into numeric scale.

100 ~ air quality standard for that pollutant

Highest – rated pollutant becomes AQI for that day.

E.g. ozone = 90, Sulfur dioxide = 68; AQI = 90.

Problems. *If you are*

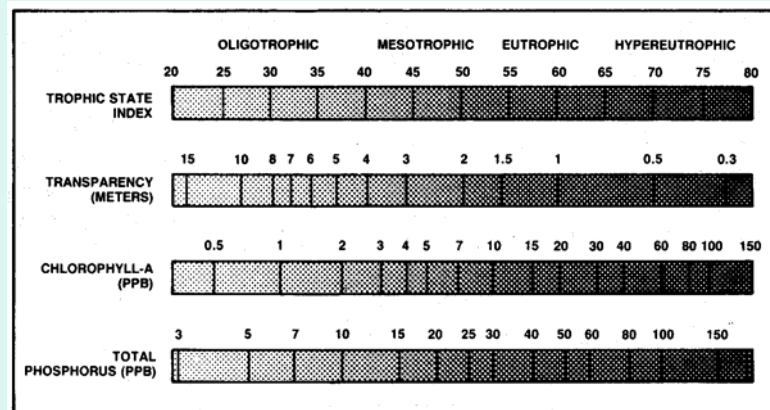
- Sensitive to one type of pollution.
- need to know where pollution types are coming from

Trophic State Indices

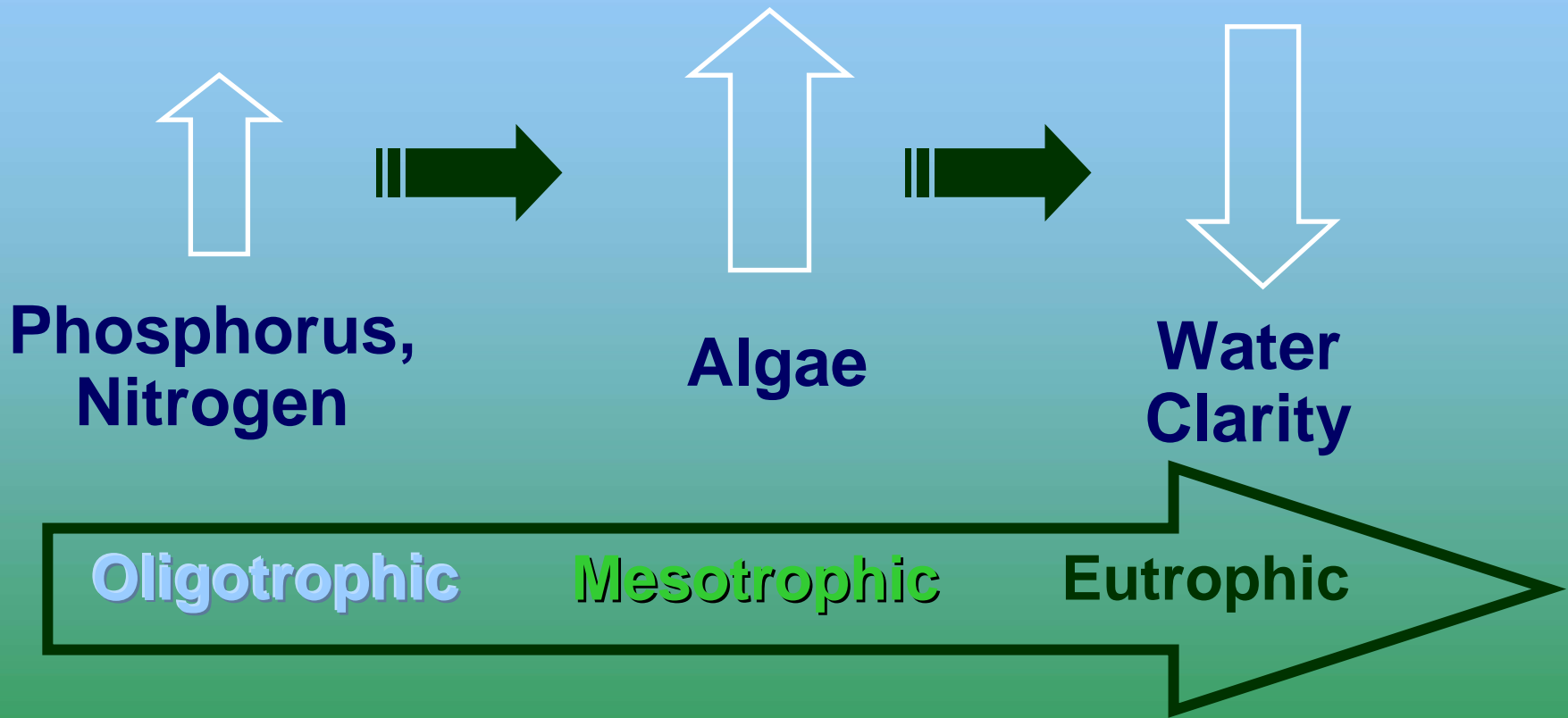
Attempt to provide a single quantitative index for the **purpose of classifying and ranking lakes, from standpoint of nutrient influence on water quality** .

Carlson TSI useful for

- comparing lakes within a region
- assessing changes in trophic status over time.
 - Scale is 0 to 100
 - Higher values correspond to increased trophic state.
 - 10 unit increase = halving of Secchi depth & doubling of P concentration.



Carlson's Trophic State Index



Important to emphasize the continuum not compartmentalize

The Great North American Secchi Dip-in
<http://dipin.kent.edu/index.htm>

Carlson TSI Formulae:

$$\text{TSI} = 9.81 \ln \text{Chlorophyll a (ug/L)} + 30.6$$

$$\text{TSI} = 14.42 \ln \text{Total phosphorus (ug/L)} + 4.15$$

$$\text{TSI} = 60 - 14.41 \ln \text{Secchi disk (meters)}$$

Because these are interrelated by linear regression models, any one of the variables can be used to derive a TSI score.

- CHL > TP > Secchi
- For northern temperate lakes
- Lakes with few rooted aquatic plants
- Little non-algal turbidity

Does trophic state = water quality?

NO! Trophic state is based on an absolute scale, water quality describes a condition in relation to (human) needs and values

A list of possible changes that might be expected in a north temperate lake as the amount of algae changes along the trophic state gradient.

TSI	Chl (ug/L)	SD (m)	TP (ug/L)	Attributes	Water Supply	Fisheries & Recreation
<30	<0.95	>8	<6	Oligotrophy: Clear water, oxygen throughout the year in the hypolimnion	Water may be suitable for an unfiltered water supply.	Salmonid fisheries dominate
30-40	0.95-2.6	8-4	6-12	Hypolimnia of shallower lakes may become anoxic		Salmonid fisheries in deep lakes only
40-50	2.6-7.3	4-2	12-24	Mesotrophy: Water moderately clear; increasing probability of hypolimnetic anoxia during summer	Iron, manganese, taste, and odor problems worsen. Raw water turbidity requires filtration.	Hypolimnetic anoxia results in loss of salmonids. Walleye may predominate
50-60	7.3-20	2-1	24-48	Eutrophy: Anoxic hypolimnia, macrophyte problems possible		Warm-water fisheries only. Bass may dominate.
60-70	20-56	0.5-1	48-96	Blue-green algae dominate, algal scums and macrophyte problems	Episodes of severe taste and odor possible.	Nuisance macrophytes, algal scums, and low transparency may discourage swimming and boating.
70-80	56-155	0.25-0.5	96-192	Hypereutrophy: (light limited productivity). Dense algae and macrophytes		
>80	>155	<0.25	192-384	Algal scums, few macrophytes		Rough fish dominate; summer fish kills possible

Multimetric Indices (IBI, RBP)

- integrate several biological metrics to indicate condition.
- designed to be sensitive to a range of physical, chemical, and biological stressors.
- are relatively easy to measure and interpret.

Indices - Multimetric approach

each metric is given a rating according to whether its value

- approximates,
- deviates ***somewhat*** from, or
- deviates ***strongly*** from

values measured in *least-disturbed ecosystems* of a particular type within a region.

These ratings (e.g., excellent, moderate, fair, and poor) can be **used to make decisions about how well aquatic life is being supported by the water body** .

To make multimetric biological indexes effective you must:

- **Classify environments** to define homogeneous sets within or across ecoregions (e.g., streams, lakes, or wetlands; large or small streams; warm-water or cold-water lakes; high- or low-gradient streams).
- **Select measurable attributes** that provide **reliable and relevant signals** about the biological effects of human activities.
- **Develop sampling protocols** and designs that ensure that those biological attributes are measured accurately and precisely.
- Devise analytical procedures to **extract and understand relevant patterns** in those data.
- **Communicate the results** to citizens and policymakers so that all concerned communities can contribute to environmental policy.

Selecting/Creating metrics and indices

Good Metrics:

- Sensitive to change
- Predictable, consistent

Metrics vary in their scale--they can be:

- integers
- percentages
- dimensionless numbers
- qualitative observations (e.g. grassland vs. forest).

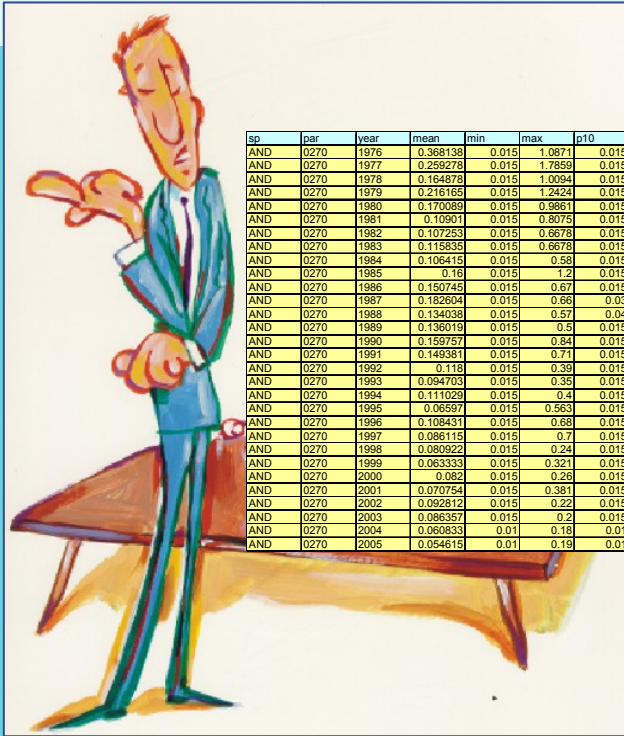
Translation into unitless scores must address this.

Standardization assumes that each metric

- has the same value and importance (i.e., they are weighted the same), and that
- a 50% change in one metric is of equal value to assessment as a 50% change in another.

Management is not too bright...

...and has the attention span of a hamster



sp	par	year	mean	min	max	p10	p25	p50	p75	p90	n	oag	priawr	pnambv	pnkrw	tr95	tr95w	tr80	tr80w	fiawr	fambv	fkrrw	pal80	pal95
AND	0270	1976	0.368138	0.015	1.0871	0.015	0.073725	0.24845	0.629	0.91549	50	0.03	30	30	-9999	false	0	false	0	5.4355	5.4355	0		roneve
AND	0270	1977	0.259278	0.015	1.7859	0.015	0.015	0.0776	0.3106	0.83858	51	0.03	19	19	-9999	false	0	false	0	8.9295	8.9295	0		roneve
AND	0270	1978	0.164878	0.015	1.0094	0.015	0.0427	0.1009	0.2213	0.396	49	0.03	17	17	-9999	false	0	false	0	5.047	5.047	0		roneve
AND	0270	1979	0.216165	0.015	1.2424	0.015	0.0388	0.132	0.229025	0.6981	40	0.03	15	15	-9999	false	0	false	0	6.212	6.212	0		roneve
AND	0270	1980	0.170089	0.015	0.9861	0.015	0.0311	0.09705	0.20385	0.47986	46	0.03	12	12	-9999	false	-0.02176	false	-0.02176	4.9305	4.9305	0		roneve
AND	0270	1981	0.10901	0.015	0.8075	0.015	0.015	0.0621	0.1398	0.26947	50	0.03	8	8	-9999	false	-0.01929	true	-0.01929	4.0375	4.0375	0		roneve
AND	0270	1982	0.107253	0.015	0.6678	0.015	0.015	0.0388	0.1398	0.2873	49	0.03	7	7	-9999	true	-0.02004	false	-0.02004	3.339	3.339	0		rodove
AND	0270	1983	0.115835	0.015	0.6678	0.015	0.015	0.06	0.14	0.36808	51	0.03	8	8	-9999	true	-0.0619	true	-0.07326	3.339	3.339	0		rodove
AND	0270	1984	0.106415	0.015	0.58	0.015	0.015	0.06	0.14	0.322	53	0.03	8	8	-9999	false	-0.01713	false	-0.01399	2.9	2.9	0		roneve
AND	0270	1985	0.16	0.015	1.2	0.015	0.04	0.1	0.2	0.386	43	0.03	10	10	-9999	false	0.011582	true	0.01175	6	6	0		roneve
AND	0270	1986	0.150745	0.015	0.67	0.015	0.03	0.1	0.22	0.39	47	0.03	13	13	-9999	false	0.020775	true	0.024748	3.35	3.35	0		roneve
AND	0270	1987	0.182604	0.015	0.66	0.03	0.06	0.13	0.2575	0.474	48	0.03	15	15	-9999	true	0.033502	true	0.033502	3.3	3.3	0		rupve
AND	0270	1988	0.134038	0.015	0.57	0.04	0.06	0.105	0.1875	0.271	52	0.03	9	9	-9999	false	0.016987	false	0.016987	2.85	2.85	0		roneve
AND	0270	1989	0.136019	0.015	0.5	0.015	0.05	0.1	0.18	0.306	103	0.03	22	22	-9999	false	-0.00451	false	-0.00451	2.5	2.5	0		roneve
AND	0270	1990	0.159757	0.015	0.94	0.015	0.04	0.12	0.25	0.328	103	0.03	33	33	-9999	false	-0.01785	false	-0.01851	4.2	4.2	0		roneve
AND	0270	1991	0.149381	0.015	0.71	0.015	0.03	0.13	0.22	0.336	113	0.03	32	32	-9999	false	-0.01476	false	-0.01476	3.55	3.55	0		roneve
AND	0270	1992	0.118	0.015	0.39	0.015	0.03	0.11	0.16	0.277	100	0.03	12	12	-9999	false	-0.005	false	-0.005	1.95	1.95	0		roneve
AND	0270	1993	0.094703	0.015	0.35	0.015	0.04	0.07	0.14	0.208	101	0.03	10	10	-9999	false	-0.0085	false	-0.0085	1.75	1.75	0		roneve
AND	0270	1994	0.111029	0.015	0.4	0.015	0.03	0.1	0.15	0.227	102	0.03	13	13	-9999	false	-0.00875	false	-0.00875	2	2	0		roneve
AND	0270	1995	0.06597	0.015	0.563	0.015	0.015	0.03	0.083	0.169	100	0.03	4	4	-9999	true	-0.01425	true	-0.01425	2.815	2.815	0		rodove
AND	0270	1996	0.108431	0.015	0.68	0.015	0.04	0.08	0.16	0.218	51	0.03	6	6	-9999	false	-0.0045	false	-0.0045	3.4	3.4	0		roneve
AND	0270	1997	0.086115	0.015	0.71	0.015	0.01875	0.045	0.1	0.207	52	0.03	5	5	-9999	false	-0.0065	false	-0.0065	3.5	3.5	0		roneve
AND	0270	1998	0.080922	0.015	0.24	0.015	0.03	0.06	0.13	0.178	51	0.03	3	3	-9999	false	-0.005	false	-0.005	1.2	1.2	0		roneve
AND	0270	1999	0.063333	0.015	0.321	0.015	0.015	0.04	0.09	0.147	102	0.03	4	4	-9999	false	-0.002	false	-0.002	1.605	1.605	0		roneve
AND	0270	2000	0.082	0.015	0.26	0.015	0.015	0.0595	0.13375	0.18	64	0.03	4	4	-9999	false	-0.00475	false	-0.00475	1.3	1.3	0		roneve
AND	0270	2001	0.070754	0.015	0.381	0.015	0.015	0.06	0.097	0.1416	65	0.03	2	2	-9999	false	-3.1E-08	false	-3.1E-08	1.905	1.905	0		roneve
AND	0270	2002	0.092812	0.015	0.22	0.015	0.0425	0.096	0.1375	0.1731	16	0.03	1	1	-9999	false	0.0035	false	0.0035	1.1	1.1	0		roneve
AND	0270	2003	0.086357	0.015	0.2	0.015	0.02925	0.0685	0.145	0.195	14	0.03	0	0	-9999	false	0.008501	true	0.008501	1	1	0		genewe
AND	0270	2004	0.060833	0.01	0.18	0.01	0.01	0.04	0.1075	0.168	12	0.02	0	0	-9999	false	-0.00125	false	-0.00125	0.9	0.9	0		genewe
AND	0270	2005	0.054615	0.01	0.19	0.01	0.01	0.03	0.11	0.17	13	0.02	0	0	-9999	false	-0.00498	false	-0.00605	0.95	0.95	0		genewe

Lessons from the European Union

Compliance



above standard

0.8-1.0 of standard

below 0.8 of standard

Trend



uptrend



downtrend



no trend or
not detectable

Quantity



$n \geq 20$



$20 > n \geq 10$



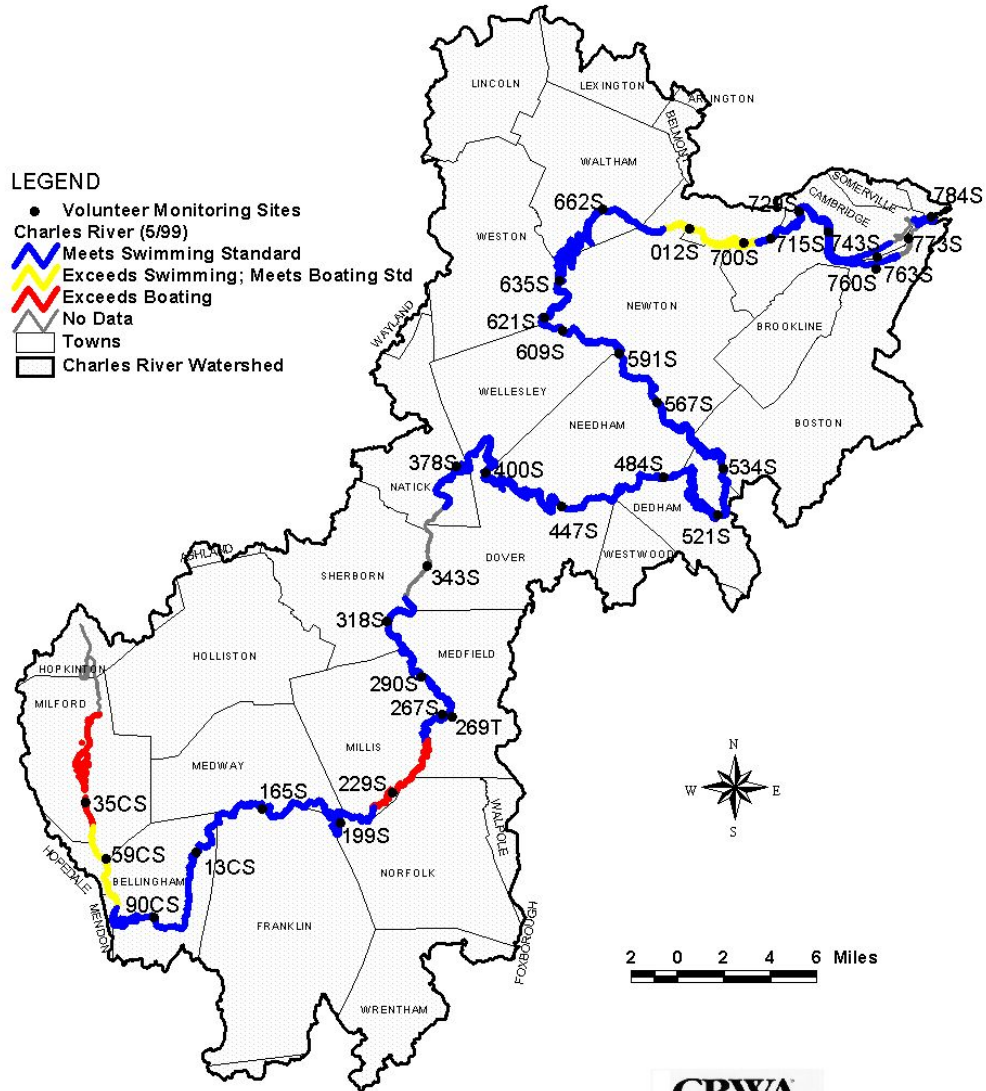
$n < 10$

Dr Peter G Stoks
Assn of Rhine Water Works
RIWA/IAWR
stoks@riwa.org

May 1999 Fecal Coliform Results

LEGEND

- Volunteer Monitoring Sites
- Charles River (5/99)
- ▬ Meets Swimming Standard
- ▬ Exceeds Swimming; Meets Boating Std
- ▬ Exceeds Boating
- △ No Data
- Towns
- ▭ Charles River Watershed



OAR



Organization for the Assabet River
9 Damonmill Square, Suite 1E
Concord, MA 01742



Assabet River in Aug:
Green but flowing

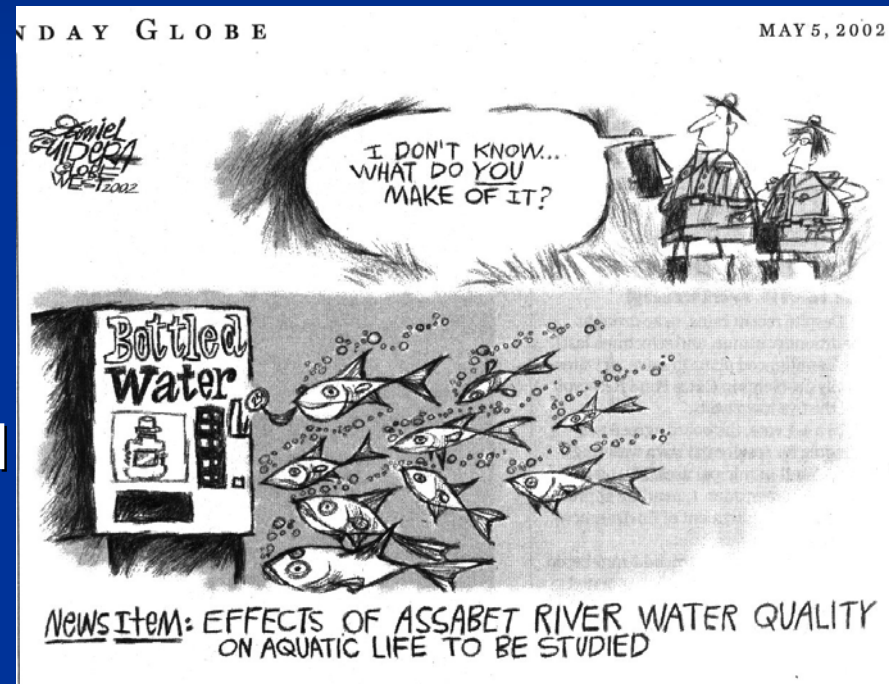
Nashoba Bk. in Aug:
Cleaner but flow-
stressed (1.0 cfs)



Organization for the Assabet River

StreamWatch Project











- Evaluate streamflow, water quality, and habitat availability.
- Communicate timely, accurate data.
- Raise awareness of the need to protect in-stream flows.



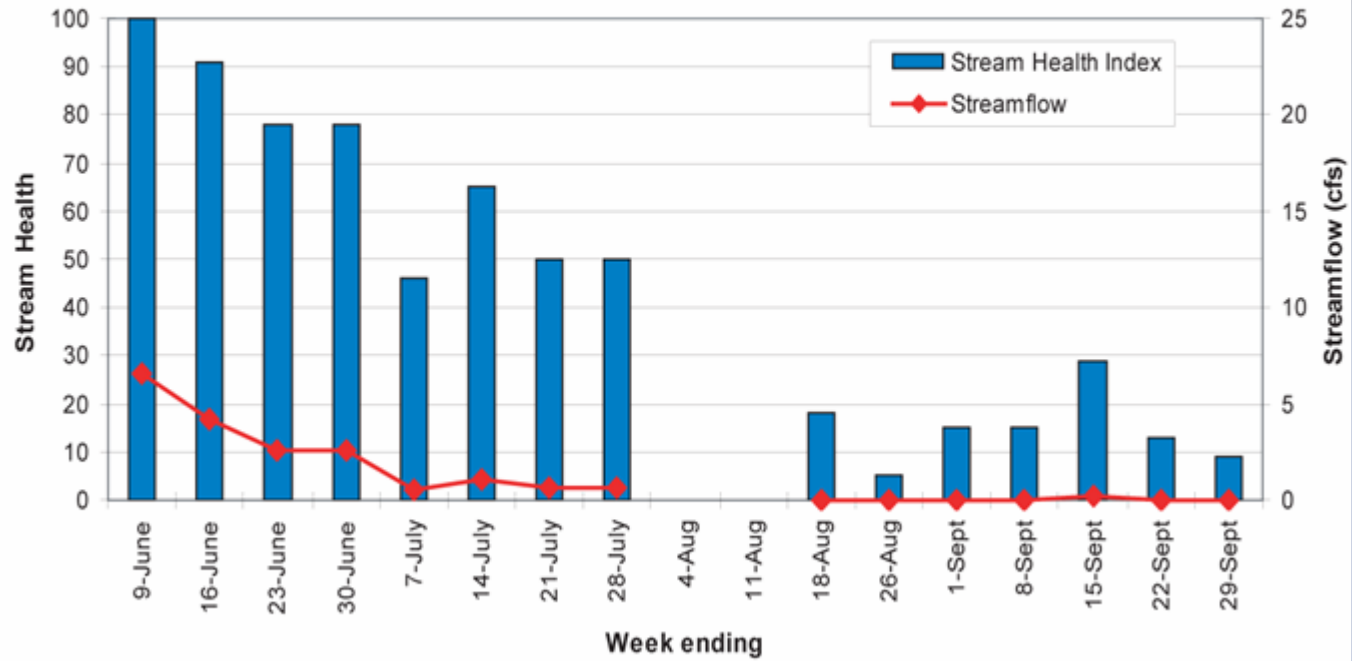
OAR

Organization for the Assabet River
9 Damonmill Square, Suite 1E
Concord, MA 01742

Reporting Ranges

	Index Score Ranges	Range Description	Stream Health Index Graphic
	81-100	Excellent <i>(optimal conditions)</i>	
	61-80	Good <i>(some effects observed)</i>	
	41-60	Fair <i>(light habitat impairment)</i>	
	21-40	Poor <i>(moderate habitat impairment)</i>	
	1-20	Very Poor <i>(severe habitat impairment)</i>	

Danforth Brook, Hudson, MA
Stream Health and Streamflow - June to Sept 2007

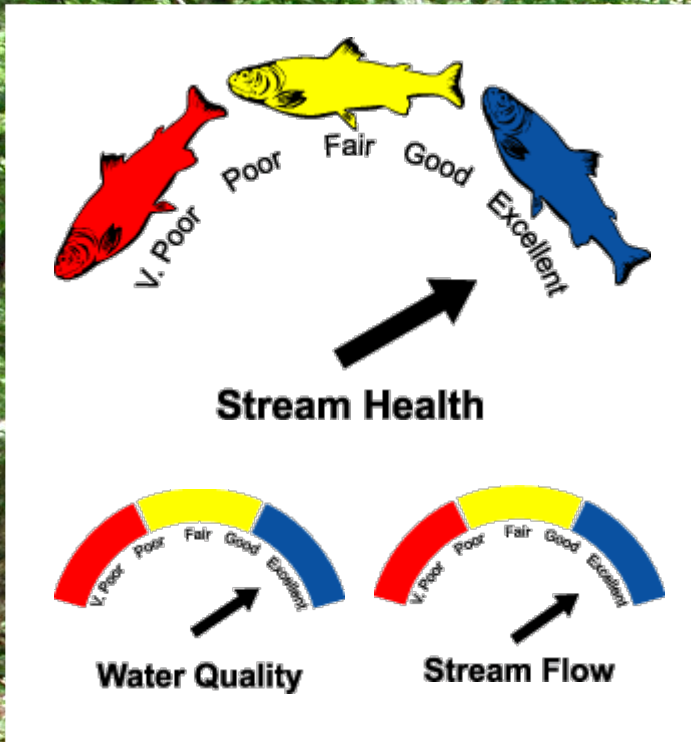


81 - 100	Excellent
61 - 80	Good
41 - 60	Fair
21 - 40	Poor
1 - 20	Very Poor

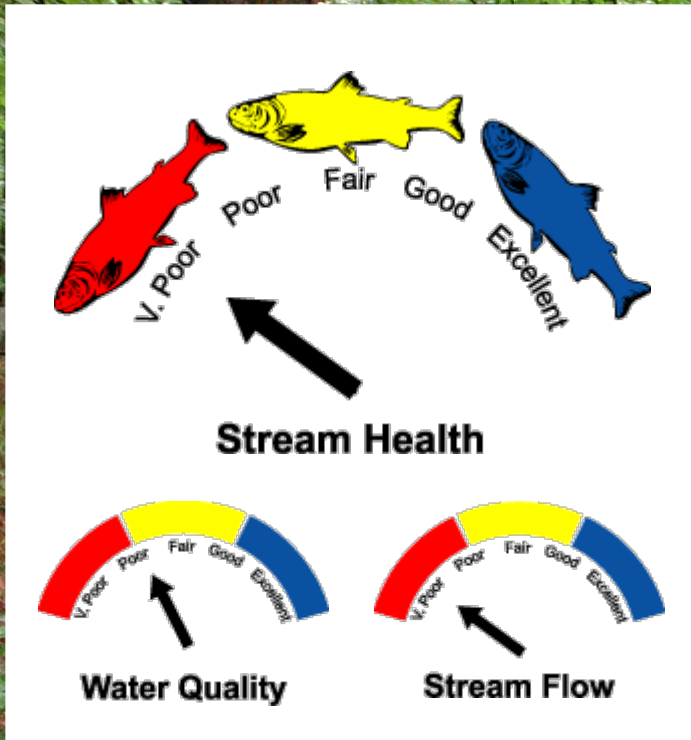
Danforth Brook Index Readings - Summer 2007

for the week ending

	9-Jun	16-Jun	23-Jun	30-Jun	7-July	14-July	21-July	28-July	4-Aug	11-Aug	18-Aug	26-Aug	1-Sep	8-Sep	15-Sept	22-Sept	29-Sept
WQ	100	93	93	93	93	80	73	73	nr	nr	63	63	63	63	63	85	85
Flow	100	96	82	81	34	51	39	38	nr	nr	10	9	9	9	17	9	7
Habitat	100	85	65	65	40	70	50	50	nr	nr	20	15	15	15	35	10	5
Stream Health	100	91	78	78	46	65	50	50	nr	nr	18	15	15	15	29	13	9

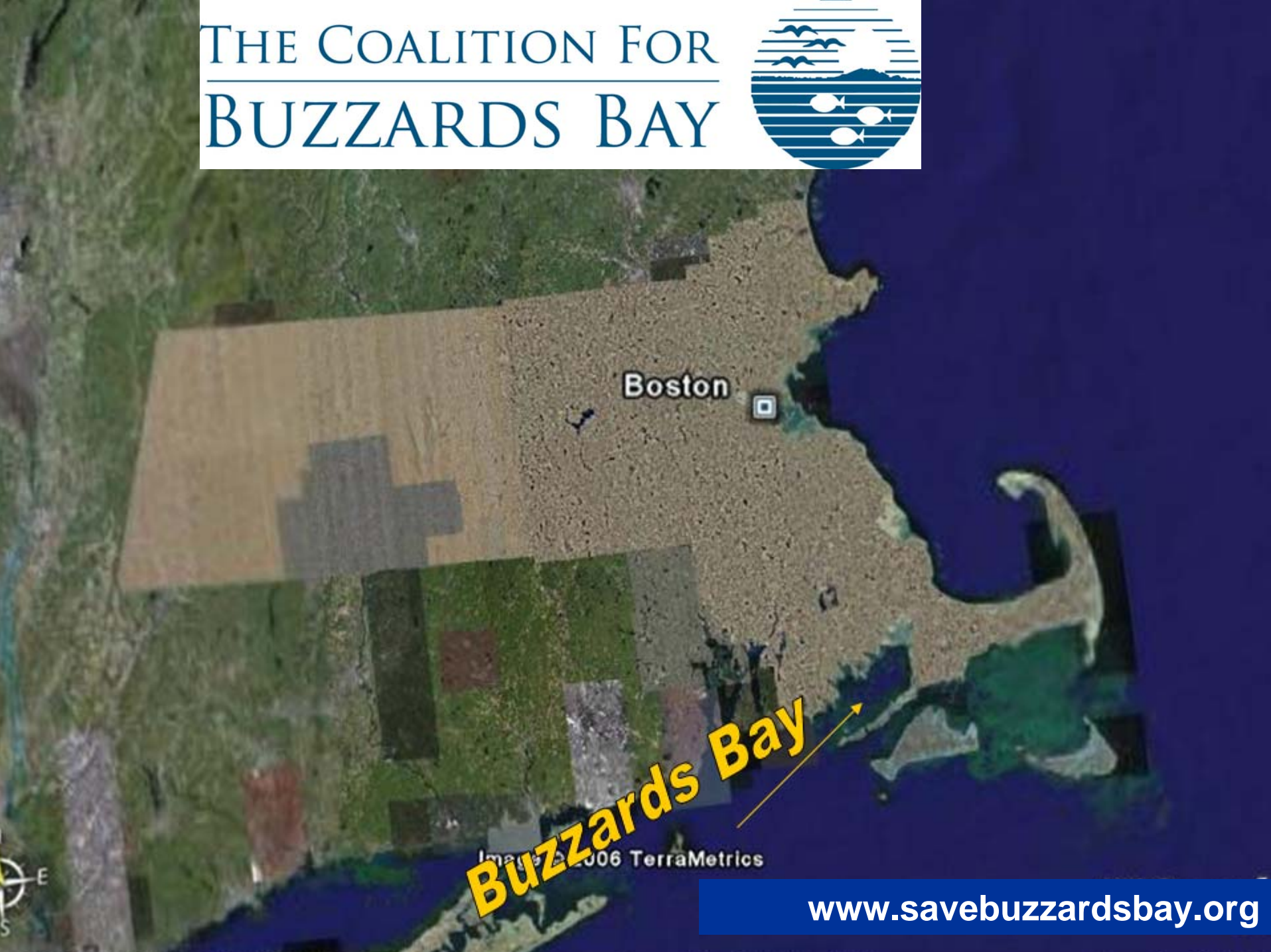


Upstream 4.99 cfs



Upstream: 0.04 cfs

THE COALITION FOR BUZZARDS BAY



Buzzards Bay

Image © 2006 TerraMetrics

www.savebuzzardsbay.org

simple, short, educational...

The Buzzards Bay Health Index



Good to Excellent (65-100)



Fair (35-65)



Poor/Eutrophic Conditions (<35)

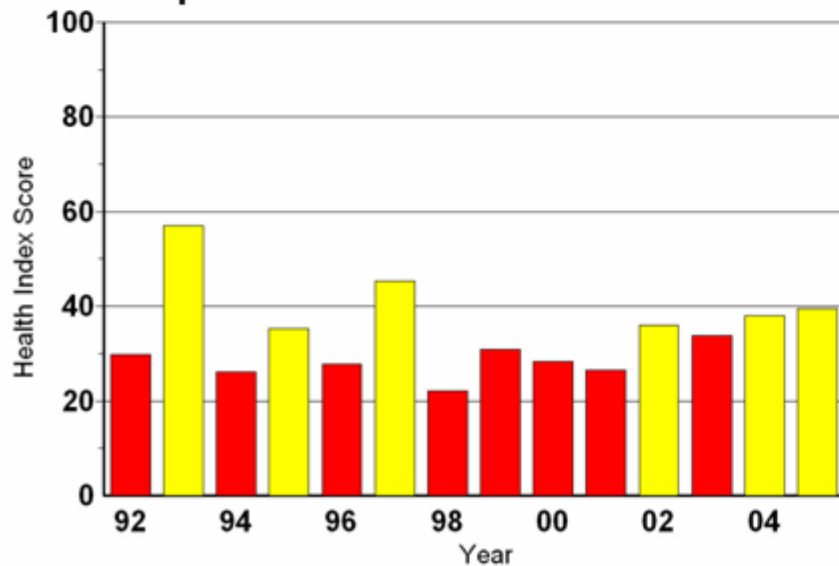
The Bay Health Index measures the relative health of each of Buzzards Bay's major harbors and coves. It does not include bacteria monitoring and is not an index of swimmability or shellfish bed status.

The Index is calculated from scores of mean summertime water clarity, phytoplankton pigments, organic nitrogen, inorganic nitrogen and the lowest 20% of dissolved oxygen concentrations. Central Buzzards Bay - which exhibits excellent water quality - would score close to 100 percent on the Index.

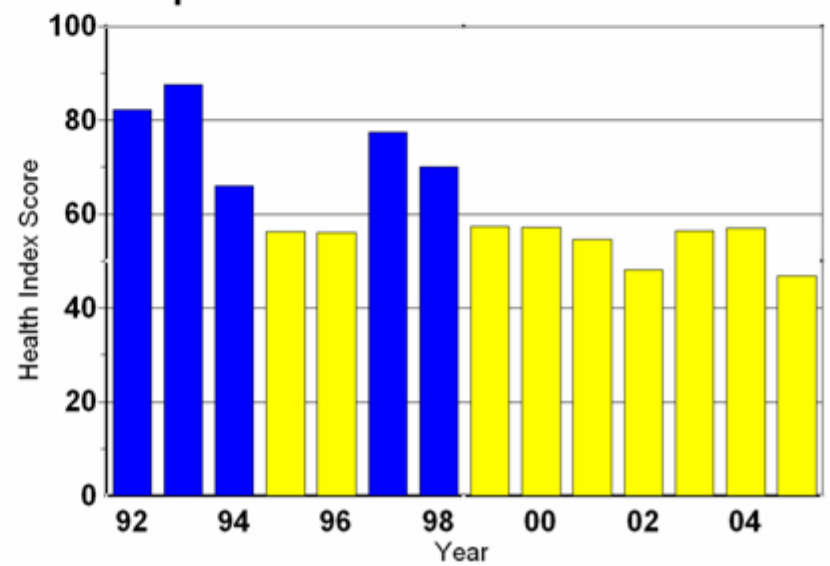
...show long-term ecological trends and
as a method to improve the public and
town elected officials understanding of local
water quality

Parameter	Health Index Score	
	0 Point Value	100 Point Value
Lowest 20 % Oxygen Saturation	40%	90%
Transparency (Secchi)	0.6 meter	3.0 meter
Chlorophyll	10.0 µg/L	3.0 µg/L
DIN	.14 ppm	.014 ppm
TON	.6 ppm	.28 ppm

Westport East Branch - Inner



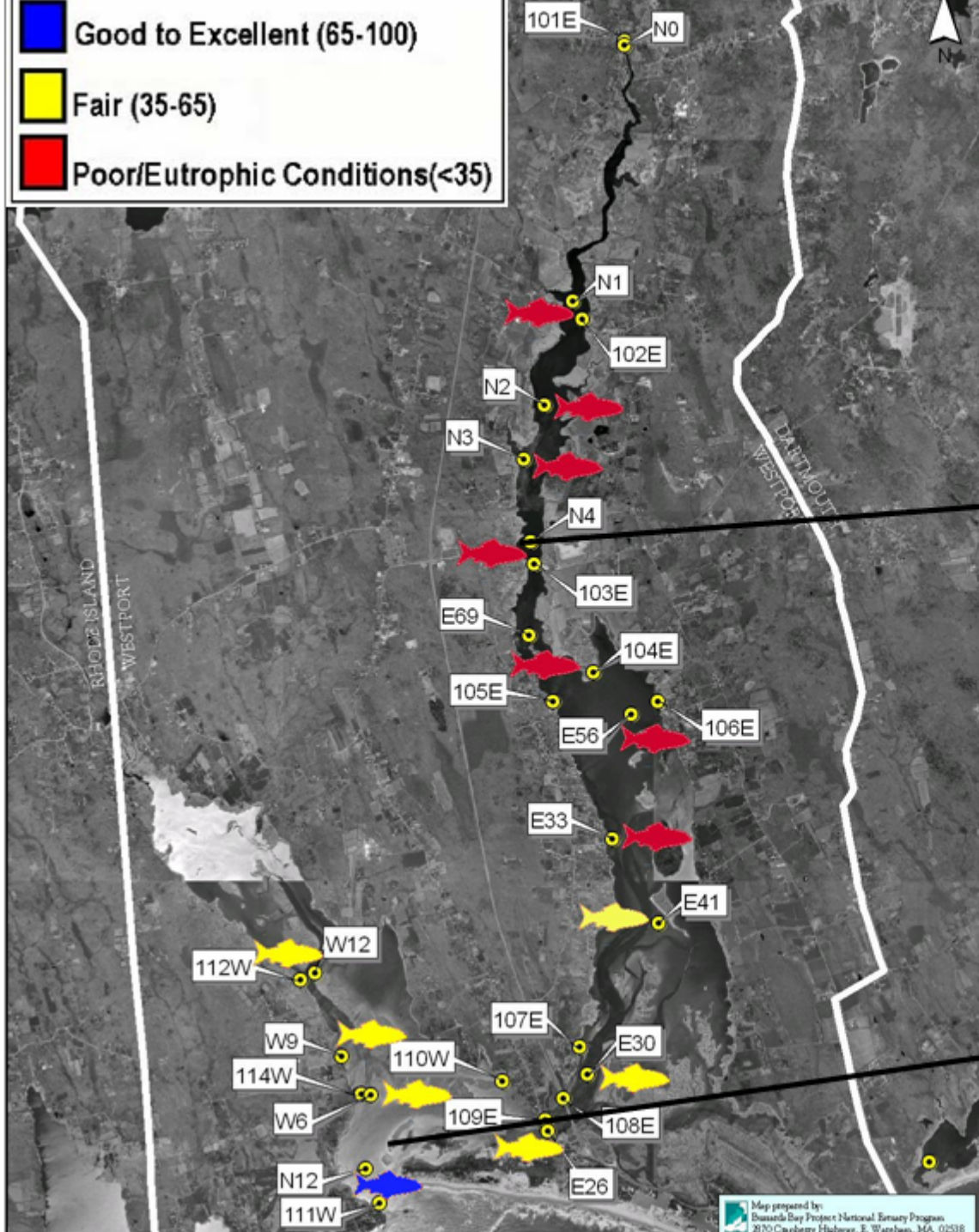
Westport East Branch - Outer



Good to Excellent (65-100)

Fair (35-65)

Poor/Eutrophic Conditions (<35)



Maps, index color, pictures, text.



**Poor Water Quality =
Loss of eelgrass,
fish habitat,
species diversity.**





Newspaper articles

Other reports, newsletters

Sunday Standard-Times

SERVING THE SOUTHCOAST COMMUNITY

SUNDAY, June 17, 2007

New Bedford, Mass.

SouthCoastToday.com

Newstand: \$2.00



Sea lettuce and algae float on the surface of Apponaugsett Harbor, Carlsbad, Calif.

Buzzards Bay's health declines

Nitrogen pollution from land development cited as major reason in environmental report



By DECKY W. EDGEM
Health-Times staff writer

The health of Buzzards Bay is declining due to population growth and development pressure in watershed communities, which have increased pollution and destroyed natural filters that keep the bay clean, according to a new report by a local conservation group.

The 2007 state of the Bay report — to be released today by the Coalition for Buzzards Bay — examined pollution sources, watershed features and living marine resources to determine the bay's overall health.

The Bay's score off than it was in 2003 when the first state of the Bay report came out, according to the analysis.

"The bay can't take it any more dealing with nitrogen pollution from wastewater treatment," said Mark Larsson, the coalition's executive director.

Nitrogen from home septic systems and town sewer plants is making the bay's near-shore waters cloudy and murky and killing outgrass beds, which once supported a thriving bay scallop population.

Food processing waste from the 4.5-square-mile Buzzards Bay watershed is also contributing to the loss of forests, wetlands and stream buffers that filter nitrogen and other pollutants before they

See POLLUTION A4



THE COALITION FOR BUZZARDS BAY STATE OF THE BAY

2007 SCORE
45

DOWN 3 FROM 48 IN 2003

What use is the bay to us if we don't have a clean, healthy environment? It's a question that's been asked many times in the past. But now it's more important than ever. The bay is the heart of our community, and it's the only place where we can enjoy the outdoors. It's the only place where we can see the sun, feel the wind, and hear the waves. It's the only place where we can be with our families and friends. It's the only place where we can be with ourselves. It's the only place where we can be with the world.

INCREASING NITROGEN POLLUTION IS DRIVING BAY DECLINE

56 DOWN 3 FROM 59 IN 2003

BACTERIA
56 DOWN 1 FROM 59 IN 2003

TOXIC POLLUTION
47 UP 2 FROM 45 IN 2003

What's the State of Your Local Harbor or Cove? A year-long study covering everything from water quality to beach conditions. The report is a comprehensive look at the bay's health, and it's the only one of its kind. It's the only one that's been done in the bay, and it's the only one that's been done in the state. It's the only one that's been done in the country, and it's the only one that's been done in the world.

NITROGEN POLLUTION FUELING DRAMATIC LOSSES OF EELGRASS MEADOWS

25 DOWN 9 FROM 34 IN 2003

WETLANDS
60 DOWN 1 FROM 61 IN 2003

RIVER HERRING
1 DOWN 4 FROM 5 IN 2003

LESS EELGRASS, FEWER SCALLOPS
10 BAY SCALLOPS DOWN 2 FROM 12 IN 2003

What's the State of Your Local Harbor or Cove? A year-long study covering everything from water quality to beach conditions. The report is a comprehensive look at the bay's health, and it's the only one of its kind. It's the only one that's been done in the bay, and it's the only one that's been done in the state. It's the only one that's been done in the country, and it's the only one that's been done in the world.

Presenting Indices

Know your target audience

Expertise level

Particular interest

Know your objectives

Personal: resource use

Education

Resource management/regulation

Where to target resources

Impaired waters designation

TMDL development

Etc.

A few general rules...

- The overall “score” is valuable,
- but make supporting detailed information accessible.
- Print score/color on web site home page, familiar icon/box (like weather info)
- Provide clickable links to more detailed information.

Create your own indices!

Jerry Schoen's examples.

- **Trout comfort zone** (Combine DO, temperature, volume of lake containing suitable values. ... add duration/frequency of excursions?)
- **Boating recreation index** (Number of days when water levels, water quality, weather, etc. (absence of duckweed on lake surface, open channels) combine for “pleasant” boating experiences... add economic impact?)
- **Fishing recreation index** (Similar to boating - # of days when water levels, bug hatches, etc. afford quality fishing)
- **Beach closure days** (see fishing, boating above... for added economic impact, consider extra weight for scores on holiday / high traffic periods).
- **Water clarity / home value index** (Combine Secchi disk data with real estate prices).

Thanks!
Hope this is becoming more clear!