



National Estuary Program

Program Evaluation Guidance

Final
September 28, 2007



National Estuary Program Program Evaluation Guidance

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National Estuary Program Program Evaluation Guidance

Section I: Purpose, Background, Goals, and Framework

A. Purpose

The primary purpose of the Program Evaluation (PE) process (formerly called Implementation Review) is to help the U.S. Environmental Protection Agency (EPA) determine whether the 28 programs included in the National Estuary Program (NEP) are making adequate progress implementing their Comprehensive Conservation and Management Plans (CCMP) and therefore merit continued funding under §320 of the Clean Water Act (CWA). Continued funding for each NEP under §320 of the CWA is contingent upon Congress appropriating sufficient funds to the EPA for the purpose of implementing the NEP.

The PE process also is useful for:

- highlighting environmental results;
- highlighting strengths and challenges in program management;
- demonstrating continued stakeholder commitment;
- assessing the progress of the NEP as a national program; and
- transferring lessons learned within EPA, among NEPs, and with other watershed programs.

B. Background

The EPA began an NEP Implementation Review (IR) process in 1997 to determine which NEPs with approved CCMPs qualified for continued funding. The IR process was initially conducted every two years. In 2000, the process was streamlined and the review cycle was extended from every two to every three years for those programs that had already undergone the biennial review. In 2003, the IR process was revised with the intent to make IRs less burdensome to the NEPs while still collecting sufficient information to evaluate NEP progress and technical transfer. The IR cycle remained a three year cycle.

In 2006, the IR process was reevaluated due to increased federal program accountability, e.g., the Program Assessment Rating Tool (PART). An IR Reassessment Team composed of EPA Headquarters (HQ) staff, EPA NEP Regional Coordinators, and NEP Directors participated in the reevaluation process that led to this *NEP Program Evaluation Guidance*. For further details on proposed changes, options evaluated, and the process that resulted in this new PE Guidance, the *Implementation Review Proposed Changes, Options Evaluated, and Process* document is available upon request.

C. Goals

The goals of this PE Guidance are:

- to increase the objectivity and consistency of PEs among the different NEPs;
- to further align the PEs with individual NEP CCMP priorities and related NEP annual workplans;
- to measure progress in achieving programmatic and environmental results over the short-term, intermediate, and long-term stages of progress; and
- to better document reductions and/or changes in pressures on coastal watersheds.

D. Framework

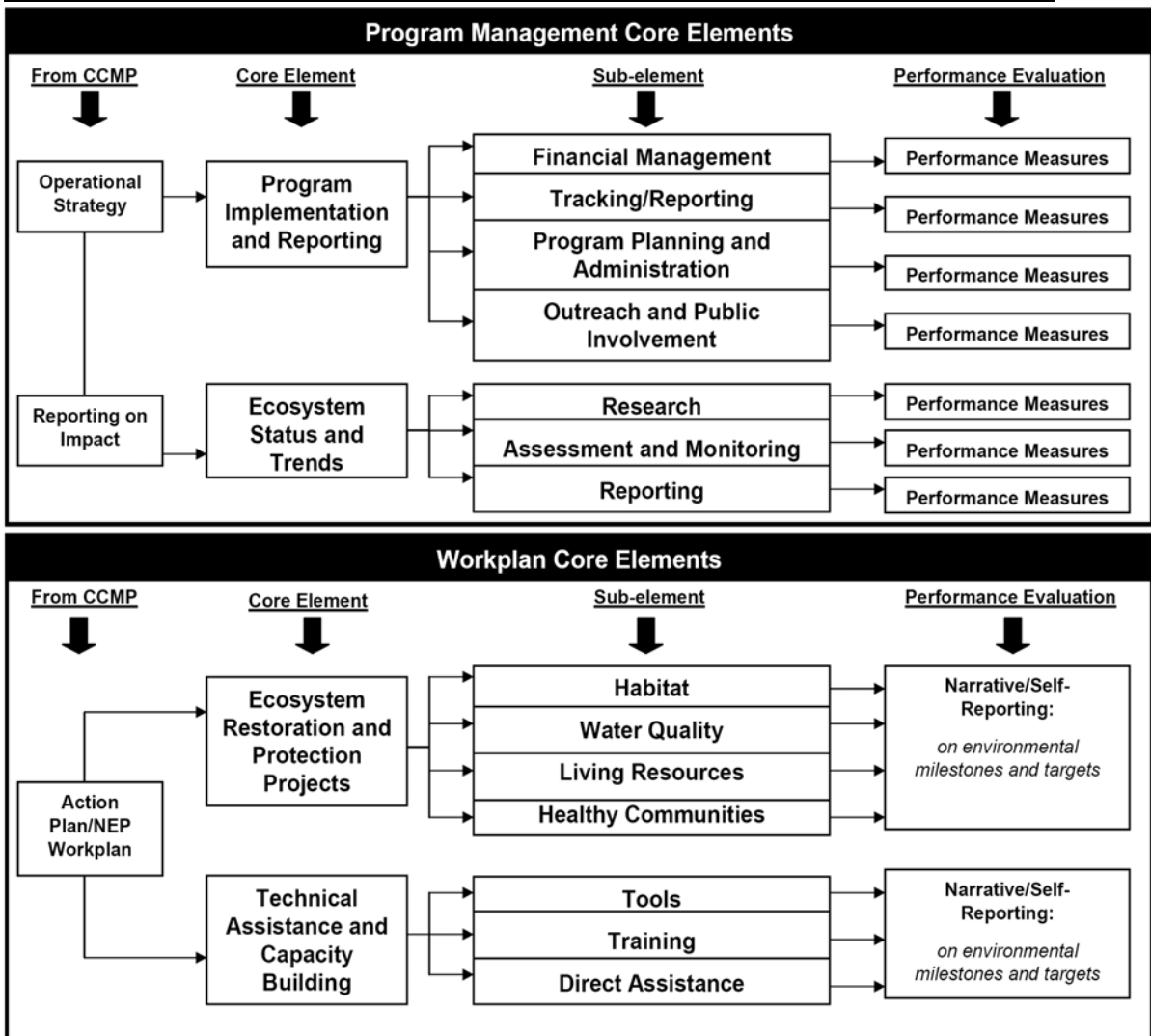
This PE Guidance uses an NEP Program Evaluation Logic Model Framework (NEP PE logic model) which incorporates the Pressure-State-Response (PSR) model (see **Attachment 1**). The NEP PE logic model is designed to help guide reporting on stages of NEP progress toward restoring and maintaining the ecological integrity of each nationally designated estuary (otherwise referred to as environmental milestones and targets). The NEP PE logic model shows causal links among activities, partnerships, outputs, and short-term, intermediate, pressures, and long-term outcomes. It is being used to help the NEPs address the challenges of accounting for such things as changes in social and economic norms. Along the same lines, the NEP PE logic model allows the NEPs to get “credit” for their activities toward reducing pressures on their estuary since a connection between the NEP activities and ultimate environmental change might be difficult to establish.

The **Figure 1** illustrates the components of the PE Guidance reflected in the NEP PE logic model. The first column of **Figure 1** includes categories derived from the *National Estuary Program Guidance Comprehensive Conservation & Management Plans: Content and Approval Requirements*. These categories are: **Operational Strategy, Reporting on Impact, and Action Plan/NEP Workplan**. Core elements and sub-elements describe these categories in more detail.

Two core elements are referred to as program management core elements because they address program management practices (**Program Implementation and Reporting and Ecosystem Status and Trends**). These two core elements are broken down into sub-elements and standardized performance measures.

Two core elements are referred to as NEP workplan core elements because they address what is *generally* in an NEP workplan to achieve CCMP goals (**Ecosystem Restoration and Protection Projects and Technical Assistance and Capacity Building**). These two core elements are broken down into sub-elements. The PE Guidance does not prescribe performance measures for these core and sub-elements.

Figure 1: Core elements and Sub-elements: NEP Program Evaluation Guidance



Section II: Program Evaluation Submission

For the years covered in the PE cycle (see **Attachments 6, 7, and 8**), the EPA’s expectations for the NEP PE package include: **(A)** the program management core elements response, **(B)** an NEP workplan narrative summary, **(C)** a budget summary, and **(D)** an on-site visit. The NEP should submit additional documentation that supports the program management core elements response, the NEP workplan narrative summary, and the budget summary, as needed.

The EPA is not specifying a page limit for the NEP workplan narrative summary. The NEP may use contractor support to prepare the PE package. *The NEP does not need to re-submit workplans with the PE package. Electronic NEP workplans submitted annually to EPA HQ will be used for the NEP PE.* The EPA Regional and HQ NEP coordinators should provide assistance to the NEPs, such as feedback on the draft PE package upon request. Please see **Attachment 9** for the PE team and NEP responsibilities.

A. Program Management Core Elements Response

There are two program management core elements: **(1) Program Implementation and Reporting** and **(2) Ecosystem Status and Trends** (see **Figure 1** and **Attachment 1**), and seven corresponding sub-elements. For the years covered within the PE cycle, the NEP should respond to the standardized performance measures in the form of checkmarks on **Attachment 2** and provide supporting documentation. *In many instances, the standardized performance measures will reflect workplan activities and therefore should be described further in the NEP workplan narrative summary described below.*

B. NEP Workplan Core Elements Narrative Summary

There are two NEP workplan core elements: **(1) Ecosystem Restoration and Protection Projects** and **(2) Technical Assistance and Capacity Building** (see **Figure 1** and **Attachment 1**), and seven corresponding sub-elements. The NEP workplan core elements and sub-elements describe *generally* what is in an NEP workplan. For the years covered within the PE cycle, the NEP should describe in the workplan narrative summary *key* NEP workplan goals and activities, and stages of progress toward achieving the NEP's environmental milestones and targets. The NEP should highlight any unique and/or innovative approaches or activities.

Please organize the workplan narrative summary using the individual NEP's existing workplan structure. Emphasize *key* workplan goals and activities by using the logic model components, *to the extent you are able*, to describe the stages of NEP progress (see **Attachment 1**). *The NEP is not expected nor required to develop a logic model for its individual program.*

The logic model definitions are as follows:

- Activities: NEP workplan projects;
- Partnerships: involvement of local community partner agencies, organizations and/or individuals;
- Outputs: products and services resulting from the workplan (i.e., deliverables);
- Short-term outcomes: changes in knowledge, learning, attitude, and skills; raising awareness amongst targeted NEP partners and stakeholder groups;
- Intermediate outcomes: changes in behavior, practice, decisions and involvement among targeted NEP partners and stakeholder groups;
- Pressures: changes, positive and/or negative, related to specific quantitative targets (e.g., percent of nitrogen reduction); and
- Long-term outcomes: changes in condition of the state, when possible.

The following three topics should be integrated into the workplan narrative summary and described in terms of the logic model components.

- ❖ When a standardized performance measure(s) (see **Attachment 2**) relates to the NEP workplan goals and activities, e.g., State of the Bay Report, please discuss it

in the workplan narrative summary. For example, submit a State of the Bay document in support of the standardized performance measure and describe the document in terms of the logic model components, i.e., as an output and/or outcome, in the workplan narrative summary.

- ❖ To demonstrate habitat accomplishments related to workplan goals and activities, please produce pie charts showing total acreage protected and restored by habitat type for the years covered in the PE cycle. Please use the National Estuary Program On-line Reporting Tool (NEPORT) and/or the Performance Indicator and Visualization Outreach Tool (PIVOT) data (see **Attachment 3**). The NEP may submit existing data and/or materials (e.g., maps, photos, case studies, etc.) to expand upon the data.
- ❖ When workplan goals and activities relate to the NEP involvement in state and local CWA activity, please include a description of the NEP role (primary, significant, support) in bringing about environmental improvements through CWA implementation, as requested in the Annual Funding Guidance (see **Attachment 5**).

In the final section of the workplan narrative summary, please include the following.

- ❖ A description of any external factors (e.g., institutional barriers, emerging issues) affecting the NEP workplan goals and/or progress, and related adaptive management strategies. Please indicate ways EPA can support efforts to address these factors.
- ❖ A brief summary of how each challenge identified in the previous PE has been addressed.

C. Budget Summary

For the years covered in the PE cycle, please provide a tabular or graphic summary with an accompanying brief narrative showing how the EPA post-CCMP funding has been used. Please include a breakdown of funds used for program staff as well as funds spent on specific projects and other activities.

In addition, please produce a table that indicates leveraging roles (primary, significant, support) (see **Attachment 4**) and amount by year, and the cumulative total amount for the years covered in the PE cycle. Please use the NEPORT data. The NEP may include narrative highlights related to leveraging roles and data.

D. On-Site Visit

The NEP should host the PE team for an on-site visit. The on-site visits are typically one to two days in length and should include meetings with key partners and stakeholders and opportunities to view on-the-ground projects. On-site visit expectations for both the NEP

and the PE team follow.

The NEP should use the PE on-site visit to:

- demonstrate successes and accomplishments, especially those that are innovative and have technical transfer possibilities;
- expand upon workplan progress summarized in the workplan narrative summary; and
- demonstrate how external factors may be influencing progress toward environmental milestones and targets.

The PE team members should use the on-site visit to:

- meet and build relationships among EPA and NEP partners;
- discuss any questions or issues with submission of PE materials;
- work together on findings; and
- present preliminary findings and recommendations to the NEP Policy and/or Management Committee, if possible.

NOTE: If the PE team cannot determine that an NEP is making adequate progress based on the PE submission, then the PE team may ask the NEP to provide supplemental documentation before or during the on-site visit to address specific questions or information gaps identified by the PE team.

Section III: Program Evaluation Process

A. Program Evaluation Team

1) Program Evaluation Team Structure

The PE teams for each NEP will include an EPA HQ team leader, the EPA HQ NEP coordinator, the EPA Regional NEP coordinator, an additional EPA regional team member, and an ex-officio NEP Director. Responsibilities for the PE team members are outlined in Section IV. B. and in **Attachment 9**.

The ex-officio NEP Director volunteers to serve on the PE team. The role of the volunteer ex-officio NEP Director will be to review the PE package, submit electronic comments to the PE team leader, participate on the PE team conference calls, participate in the on-site visit, and help draft the final PE letter. In addition, the ex-officio NEP Director should use the opportunity to provide technical transfer assistance to the NEP undergoing the PE, as well as be open to receiving insight from the NEP undergoing the PE. The ex-officio NEP Director should not be involved in EPA's final determination of a PE rating.

The EPA HQ and Regions should include PE on-site visits for their NEPs in their annual travel budget plans; however, EPA's commitment to conduct on-site visits is dependent on the availability of travel funds. The schedule for upcoming PEs

and their associated on-site visits is presented in **Attachments 6, 7, and 8**. If travel funds do not allow a full team on-site visit, alternative arrangements should be made by the PE team.

2) Program Evaluation Team Responsibility

The PE team will evaluate the PE submission based on the following.

- ❖ ***Responses and supporting documentation related to standardized performance measures for two program management core elements and respective sub-elements*** (see **Figure 1** and **Attachment 1** and **2**). The PE team will use the standardized performance measures as a tool to objectively identify a program's strengths, challenges, and areas for improvement. The standardized performance measures are based on a descriptive scoring system with four levels. The four levels are *Excellent*, *Good*, *Fully Performing*, and/or *Minimally Performing*. All the sub-elements will have the same weight of importance in terms of overall evaluation conclusions.
- ❖ ***Workplan narrative summary related to NEP specific workplan goals and activities*** (see **Figure 1** and **Attachment 1** and **2**). A qualitative assessment will be done on the workplan narrative summary that includes discussion of *key* NEP workplan goals and activities. This assessment will include attention to the details as described in Section II. B. above.
- ❖ ***Budget summary***. A qualitative assessment will be done on the budget summary submission as described in Section II. C.
- ❖ ***On-site visit with NEP staff, stakeholders and partners***. The on-site visit will be used to discuss any questions or issues with the PE submission, and to work together on the findings. It is a chance to visit project sites and meet with stakeholders and partners to informally assess the nature of stakeholder commitment and involvement in the NEP.

The PE team will document its findings in writing. Each PE team member will submit electronic comments to the PE team leader. The comments will reflect the PE package, the on-site visit, and discussions with the NEP. The PE team will develop a final PE letter based on the PE teams' documented findings. Please see **Attachment 9**.

3) Program Evaluation Rating

The EPA will make the final determination of a rating of "*pass*," "*conditional pass*," or "*fail*" (see **Figure 2**) for each program. The EPA will provide each program with a final letter with the rating and details about program strengths, challenges, and recommendations for improvements, including timeframes, as

needed. In the case that an NEP does receive a “fail” rating, EPA will work closely with the NEP to improve its performance. The EPA will decide on a case-by-case basis the status of the annual §320 allocation for any NEP that does not merit continued funding.

Figure 2: Thresholds for Final Rating

Pass	Conditional Pass	Fail
<p><u>The Program:</u></p> <ul style="list-style-type: none"> ✓ shows progress toward environmental milestones and targets; <p>and</p> <ul style="list-style-type: none"> ✓ meets all baseline expectations for <i>Fully Performing</i> in all sub-elements. 	<p><u>The Program:</u></p> <ul style="list-style-type: none"> ✓ does not show progress toward environmental milestones and targets, but meets all baseline expectations for <i>Fully Performing</i> in all sub-elements; <p>or</p> <ul style="list-style-type: none"> ✓ does not show progress toward environmental milestone and targets, and has not met all baseline expectations for <i>Fully Performing</i> in up to three sub-elements; <p>or</p> <ul style="list-style-type: none"> ✓ shows progress toward environmental milestones and targets, but has not met all baseline expectations for <i>Fully Performing</i> in up to three sub-elements. 	<p><u>The Program:</u></p> <ul style="list-style-type: none"> ✓ does not show progress toward environmental milestones and targets; <p>and, either:</p> <ul style="list-style-type: none"> ✓ is at the level of <i>Minimally Performing</i> in four or more sub-elements; <p>or</p> <ul style="list-style-type: none"> ✓ receives repeated “conditional passes” on the same challenge(s) in two consecutive PE cycles.

Section IV: NEP Groups and Program Evaluation Schedule

A. NEP Groups

The current “Tier” approach, which distributes the NEPs undergoing evaluation by time of entry into the National Program, has an uneven distribution of NEPs per PE cycle (one round of twelve NEPs, another of nine NEPs, and another of seven NEPs). The EPA HQ investigated options for new distribution approaches that would more equally distribute

the NEPs. The EPA proposed five distribution options to the IR Reassessment Team. The five options were: (1) geographic location, (2) EPA Regions, (3) Groups A-B-C (based on the former “Tier” approach), (4) population in NEP study area (i.e., urban vs. rural), and (5) size of study area. The IR Reassessment Team agreed that the best choice was the “Groups A-B-C” approach. See the *Implementation Review Proposed Changes, Options Evaluated, and Process* document for an analysis of the five NEP distribution options, available upon request.

The IR Reassessment Team believes that the use of the new “Groups A-B-C” approach best reflects the history of the Program and has the least impact on the least number of programs. By using the “Groups A-B-C” approach, none of the NEPs will be reviewed earlier than originally scheduled; two of the NEPs, Puget Sound and San Francisco Estuary, will be shifted to a PE cycle one year later than previously anticipated. If there are any changes to this schedule, the EPA will notify the NEPs in a timely manner. See **Figure 3** for the new PE Groups and **Attachments 6, 7, and 8** for the PE Schedules.

Figure 3: New PE Groups A-B-C

PE GROUP A PE: 2008 (9 Programs)	PE GROUP B PE: 2009 (10 Programs)	PE GROUP C PE: 2010 (9 Programs)
Tier III and IV	Tier I & II (-2 NEPs)	Tier V (+2 NEPS)
Barataria-Terrebonne	Albemarle-Pamlico Sounds	Barnegat Bay
Casco Bay	Buzzards Bay	Charlotte Harbor
Coastal Bend Bays	Delaware Inland Bays	Columbia River
Indian River Lagoon	Galveston Bay	Maryland Coastal Bays
Massachusetts Bay	Long Island Sound	Mobile Bay
Peconic Bay	Narragansett Bay	Morro Bay
San Juan Bay	New York / New Jersey Harbor	New Hampshire Estuaries
Tampa Bay	Partnership for the Delaware Estuary	Puget Sound
Tillamook Bay	Santa Monica Bay	San Francisco Estuary
--	Sarasota Bay	--

B. Program Evaluation Schedule

- 1) The PE team leader should hold a conference call with members of the team and the NEP Director undergoing the PE at least twelve weeks prior to the deadline for submitting the PE package. The purpose of the conference call will be to clarify questions related to the new PE Guidance and discuss logistics on the preparation and submission of the PE package.
- 2) *Program Evaluation packages will be due to EPA HQ on February 28th. Further, the PE team leader will send electronic copies of NEP workplans for the years covered within the PE cycle (see Attachments 6, 7, and 8) to*

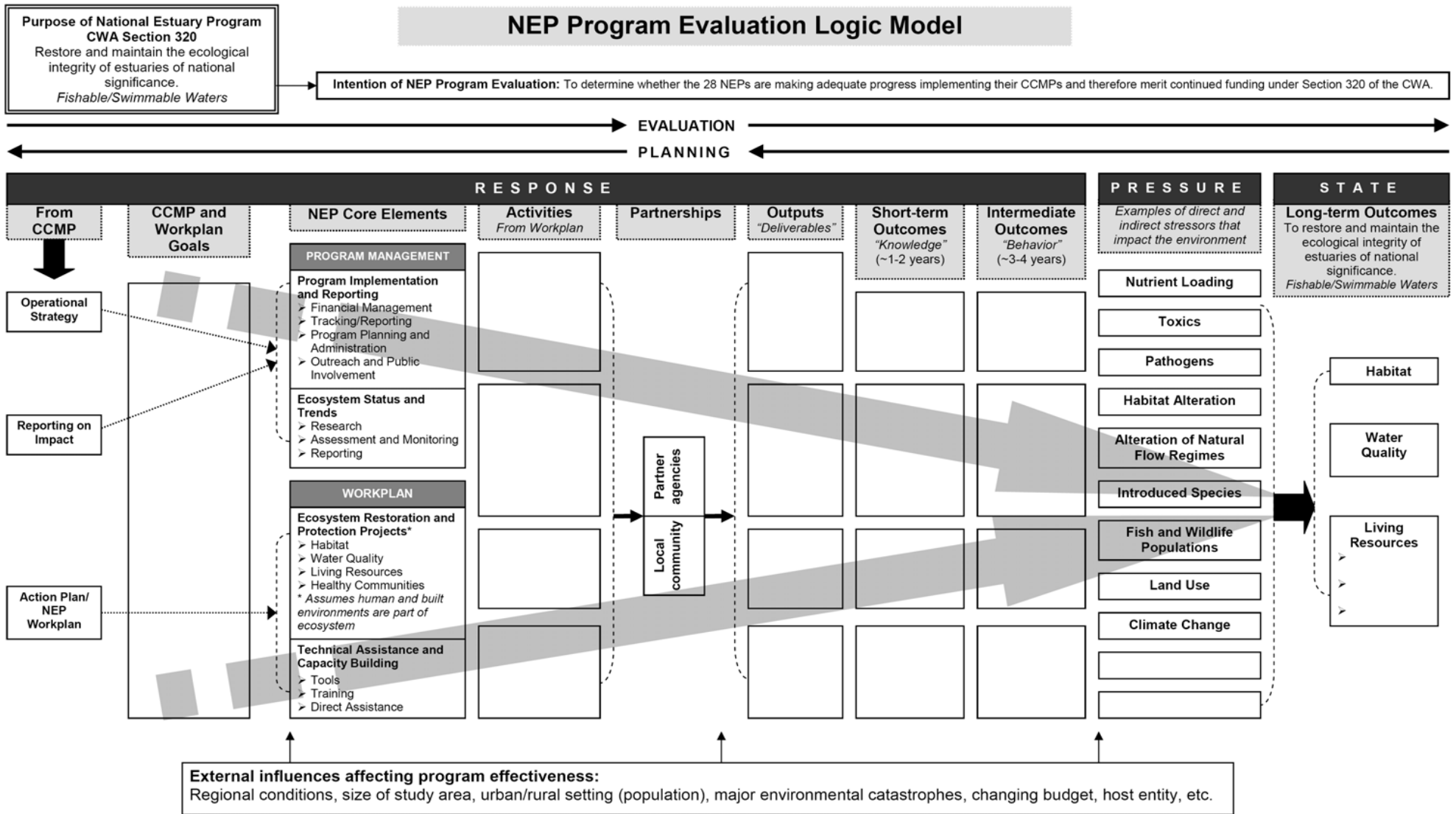
the PE team by February 28th. If February 28th falls on a weekend, the packages will be due the first Monday in March.

Street address for direct delivery (e.g., UPS, FedEx, DHL, etc.):

NEP Program Evaluation Coordinator
U.S. Environmental Protection Agency
Office of Wetlands, Oceans and Watersheds
Coastal Management Branch Room 7217
1301 Constitution Avenue, NW, Washington, DC 20004
202-566-1260 (phone)
202-566-1336 (fax)

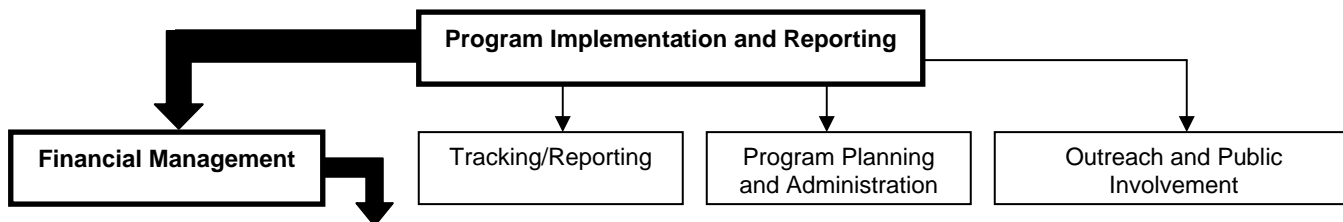
- 3) The PE team members should review the PE package and submit written electronic comments to the PE team leader within three weeks after receiving the PE package.
- 4) The PE team leader should hold a conference call with the PE team members one week after receiving comments from the PE team. The purpose of this conference call is to:
 - discuss the PE findings; and
 - identify follow-up questions or information gaps requiring the NEP to submit additional documentation.
- 5) The PE team leader should schedule a conference call between the NEP Director and the PE team within two weeks after conducting the PE team conference call. The purpose of this conference call is to:
 - discuss strengths and challenges of the NEP;
 - discuss additional documentation the NEP needs to submit in order to address any information gaps identified by the PE team. Such documentation should be submitted for EPA review prior to the on-site visit or demonstrated during the on-site visit; and
 - schedule and discuss agenda for the on-site visit.
- 6) Conduct on-site visits within four months after receiving the PE package.
- 7) The PE team leader should hold a conference call with the NEP Director and the PE team within two weeks after the on-site visit in order to allow the NEP Director the opportunity to address any concerns raised during the on-site visit.
- 8) The PE team should have a final draft PE letter within six weeks after the final conference call which includes revisions from the PE team members and NEP Director.
- 9) The OCPD management reviews and signs the PE letters within five weeks of receipt of final draft letter.

Attachment 1: The NEP Program Evaluation Logic Model



Attachment 2: Standardized Performance Measures for Program Management Core Elements

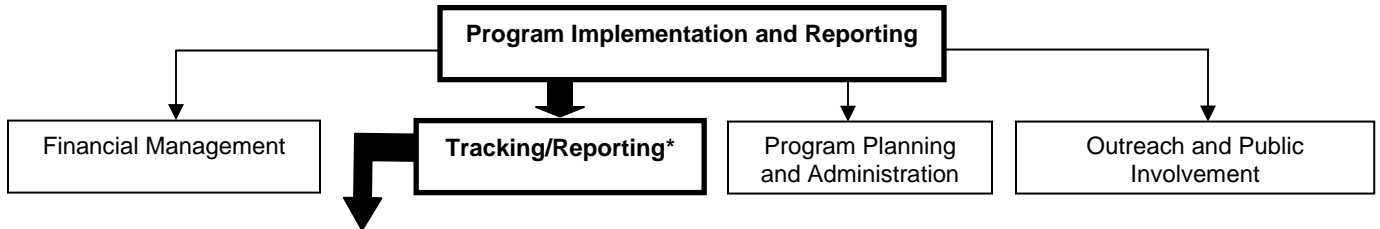
Core Element: Program Implementation and Reporting
Sub-element: **Financial Management**



LEVEL	PERFORMANCE MEASURES
Excellent	<p>The Program demonstrates <i>Excellent</i> performance because:</p> <ul style="list-style-type: none"> ○ The Program researches, identifies, and tracks prospective donors and funding opportunities (applicable for non-profit organizations). ○ Program staff, Management Conference members, and volunteers have received finance/fundraising training if appropriate. ○ The majority of the Program's outreach materials contain funding information (e.g., thanking donors, acknowledging project funding, including a membership form, etc.).
Good	<p>The Program demonstrates <i>Good</i> performance because:</p> <ul style="list-style-type: none"> ○ The Program has a current finance plan (approved by the Management Conference within the past six years) that includes estimated costs, funding sources, goals, responsibilities, and milestones. ○ The Program integrates finance planning into its annual workplan (i.e., an assessment of funding obtained in the previous year, current funding, and funding to be pursued in the coming year). ○ The Program has a monthly revenue and expenditure tracking system. ○ The Program has a case statement (a brief statement outlining accomplishments and results that could occur with additional resources).
Fully Performing	<p>Baseline expectations:</p> <ul style="list-style-type: none"> ○ The Program meets its non-federal match obligation and provides detail in the annual workplan submittal to the EPA about match funding sources and uses (e.g., workplan tasks). ○ The Program has a plan for diversifying and augmenting funding sources that is approved by the Management Conference and includes estimated costs, goals, responsibilities, and milestones. ○ The Program has the partnerships and strategic alliances to identify and secure resources to implement its CCMP.
Minimally Performing	<p>The Program does not meet all of the performance measures in the <i>Fully Performing</i> level.</p>

The EPA expects that, in order to be a *Fully Performing Program*, all baseline expectations are met. Performance measures in the *Good* and *Excellent* levels are **not required**. They are benchmarks for what the Program can do to improve performance given the Program's priorities and organizational capacity.

Core Element: Program Implementation and Reporting
Sub-element: **Tracking/Reporting***



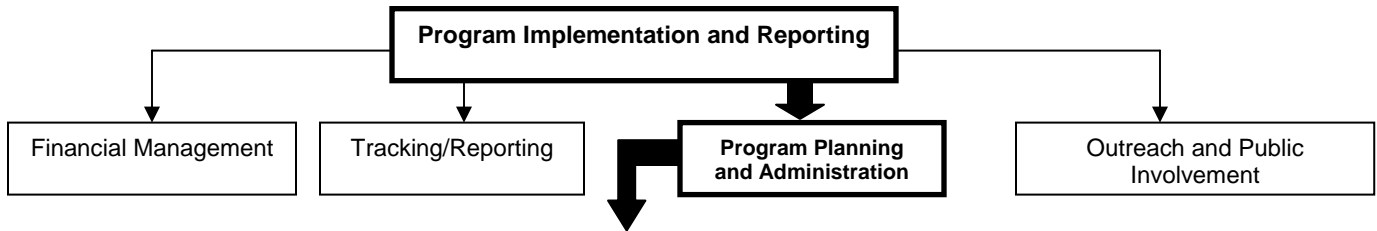
LEVEL	PERFORMANCE MEASURES
Excellent	<p>The Program demonstrates <i>Excellent</i> performance because:</p> <ul style="list-style-type: none"> ○ Biannual written reports are delivered to the EPA Regional Project Officer. ○ The Program creates a document based on CCMP implementation tracking system data for the public (via the Program’s website, public database, hard copies, and/or other media), that reports on progress toward annual workplan milestones and goals, and funding use at least annually. ○ Programmatic results are reported to the public and other stakeholders at least every two years.
Good	<p>The Program demonstrates <i>Good</i> performance because:</p> <ul style="list-style-type: none"> ○ Annual reports are delivered to the EPA Regional Project Officer. ○ The Program’s CCMP implementation tracking system contributes to reporting of environmental results. ○ The Program’s CCMP implementation tracking system is available to stakeholders and the public via the Program’s website, public database, hard copies, and/or other media. ○ Programmatic results are reported to stakeholders and the public at least every three years.
Fully Performing	<p>Baseline expectations:</p> <ul style="list-style-type: none"> ○ The Program submits approved annual workplan to the EPA HQ and Regions that tracks budgets and reports progress toward milestones, targets, and goals. ○ The Program has a CCMP implementation tracking system that outlines: <ul style="list-style-type: none"> ▪ CCMP actions/priorities; ▪ project description (including location/geo-referencing) and status (initiation, completion, delivery dates); ▪ cost of project (total, NEP contribution, source/type of funds); and ▪ partners involved and lead entity. ○ Habitat/GPRA (Attachment 3) and Leveraging (Attachment 4) data are reported as required by the EPA Annual Funding Guidance.**
Minimally Performing	<p>The Program does not meet all of the performance measures in the <i>Fully Performing</i> level.</p>

*Refers to Tracking/Reporting related to the Program’s operations including projects, funding, and government requirements.

**The NEP does not need to re-submit Habitat/GPRA and Leveraging data, as required in the Annual Funding Guidance.

The EPA expects that, in order to be a *Fully Performing* Program, all baseline expectations are met. Performance measures in the *Good* and *Excellent* levels are **not required**. They are benchmarks for what the Program can do to improve performance given the Program’s priorities and organizational capacity.

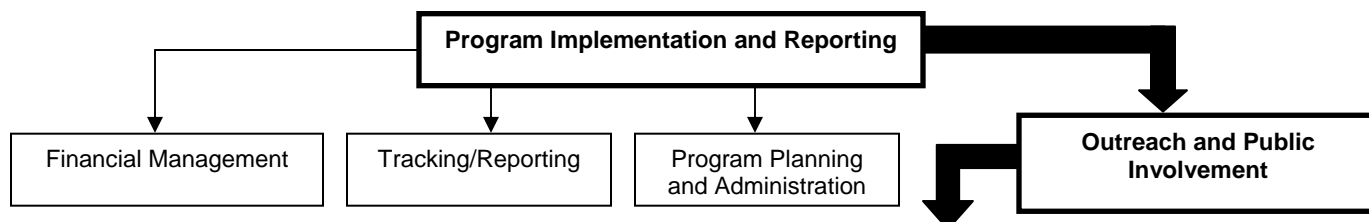
Core Element: Program Implementation and Reporting
 Sub-element: **Program Planning and Administration**



LEVEL	PERFORMANCE MEASURES
Excellent	<p>The Program demonstrates <i>Excellent</i> performance because:</p> <ul style="list-style-type: none"> ○ The Program encourages professional development opportunities for staff members. ○ The Program is a leader in the transfer of lessons learned in watershed management.
Good	<p>The Program demonstrates <i>Good</i> performance because:</p> <ul style="list-style-type: none"> ○ The Program has a Management Conference that: <ul style="list-style-type: none"> ▪ has a written vision statement and/or mission and goals; ▪ is fully engaged in developing and implementing the workplan; ▪ assists in building active partnerships; ▪ ensures broad stakeholder representation in priority setting and Program oversight; ▪ provides a clear and transparent decision-making process that includes the public (e.g., operating procedures, agreements and/or bylaws for committees, etc.); and ▪ has a mechanism for identifying existing and emerging issues. ○ The Program is seen as a leader in watershed management.
Fully Performing	<p>Baseline expectations:</p> <ul style="list-style-type: none"> ○ The Program has a Management Conference that: <ul style="list-style-type: none"> ▪ provides Program direction; ▪ oversees development and approves annual budget and workplan; ▪ ensures sufficient Program resources; ▪ sets a framework for bringing together diverse interests in a collaborative fashion (e.g., develop synergy among various organizations); ▪ ensures communication between Program committees; ▪ ensures Program actions are based on both stakeholder priorities and good science; ▪ communicates about and supports the Program; and ▪ has a process for reevaluating its priorities. ○ The Program staff coordinates and supports Management Conference responsibilities. ○ The Program has human resources principles in place (e.g., staff members have position descriptions and periodic performance reviews). ○ The Program office has autonomy with regard to the host entity (e.g., sets and follows its own priorities, exhibits visibility in the watershed, etc.).
Minimally Performing	<p>The Program does not meet all of the performance measures in the <i>Fully Performing</i> level.</p>

The EPA expects that, in order to be a *Fully Performing* Program, all baseline expectations are met. Performance measures in the *Good* and *Excellent* levels are **not required**. They are benchmarks for what the Program can do to improve performance given the Program's priorities and organizational capacity.

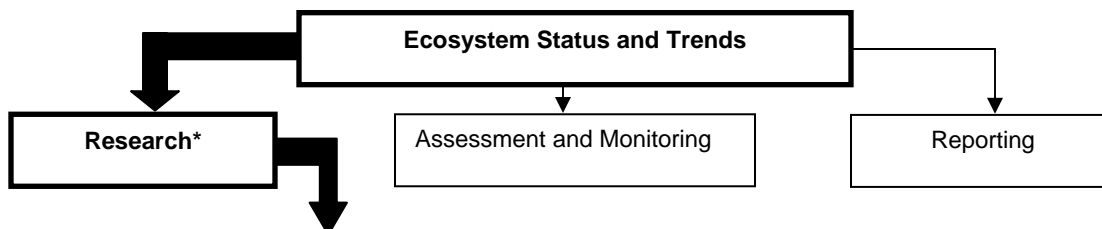
Core Element: Program Implementation and Reporting
Sub-element: **Outreach and Public Involvement**



LEVEL	PERFORMANCE MEASURES
Excellent	<p>The Program demonstrates <i>Excellent</i> performance because:</p> <ul style="list-style-type: none"> ○ The Program supports citizen recommendations by implementing/supporting priority projects via the annual workplan. ○ The Program has a media/marketing campaign underway, such as a social marketing campaign, with a specific behavior change message related to a CCMP priority issue(s). ○ The Program has a brand/image and related graphics, tag lines, etc. that effectively promote and create widespread recognition of the Program. ○ The Program has socio-economic indicators to monitor and report on the impact of outreach and public involvement activities. ○ Efforts exist to achieve and document behavior change.
Good	<p>The Program demonstrates <i>Good</i> performance because:</p> <ul style="list-style-type: none"> ○ The Program has an active CAC or analogous structure that proposes workplan projects and is represented during Management Conference or executive committee meetings. ○ The Program, through the communication plan, actively conducts outreach through such things as signage, radio/TV spots, special events, public presentations, topic-specific workshops, etc. ○ The Program supports efforts to develop and implement such things as environmental education curricula, teacher training, ecotourism programs, small grant programs, estuary celebrations, and/or citizen recognition programs. ○ The Program shares innovations and lessons learned at regional and national meetings (e.g., Estuarine Research Federation (ERF) biennial meeting, The Coastal Society (TCS) biennial meeting, Coastal Zone (CZ) biennial meeting, NEP national meeting, etc.).
Fully Performing	<p>Baseline expectations:</p> <ul style="list-style-type: none"> ○ Citizens are involved in Program decision-making and implementation (e.g., Citizens Advisory Committee (CAC) or analogous structure, system for public input, open meetings, public notice of meetings and events, and/or opportunities for reviewing and prioritizing outreach and public involvement projects, etc.). ○ The Program has a multi-year, strategic communication plan that includes needs, target audience(s), objectives, project descriptions, deliverables, and deadlines. ○ The Program has multi-media communication tools (e.g., newsletters, annual reports, fact sheets, website, listserves, and/or videos/CDs, etc.) that are updated as needed.
Minimally Performing	<p>The Program does not meet all of the performance measures in the <i>Fully Performing</i> level.</p>

The EPA expects that, in order to be a *Fully Performing* Program, all baseline expectations are met. Performance measures in the *Good* and *Excellent* levels are **not required**. They are benchmarks for what the Program can do to improve performance given the Program's priorities and organizational capacity.

Core Element: Ecosystem Status and Trends
Sub-element: **Research***

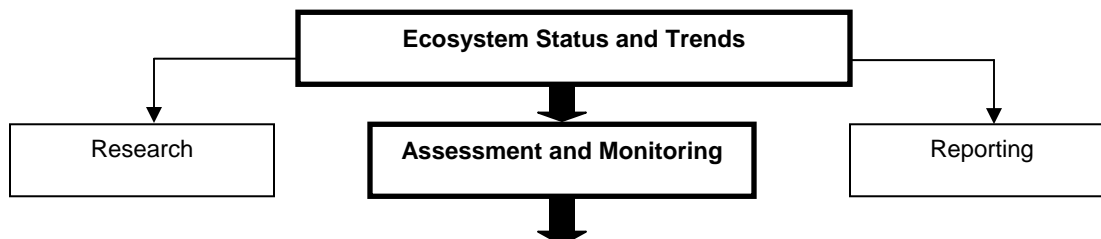


LEVEL	PERFORMANCE MEASURES
Excellent	<p>The Program demonstrates <i>Excellent</i> performance because:</p> <ul style="list-style-type: none"> ○ Research is used to change policy. ○ The Program shares its science and technology research and findings at regional and national meetings (e.g., Estuarine Research Federation (ERF) biennial meeting, The Coastal Society (TCS) biennial meeting, Coastal Zone (CZ) biennial meeting, NEP national meeting, etc.). ○ Scientific and technical reports produced by the NEP are peer reviewed. ○ Program staff sits on state and national science boards and committees.
Good	<p>The Program demonstrates <i>Good</i> performance because:</p> <ul style="list-style-type: none"> ○ Research is conducted by appropriate partners. ○ Research identifies significant, missing data that warrant additional monitoring or sampling. ○ The Program uses research results to develop management options and implement solutions. ○ Results from research are combined and translated into plain English for reporting to the public. ○ The Program or its partners have established a process to regularly reevaluate its research needs.
Fully Performing	<p>Baseline expectations:</p> <ul style="list-style-type: none"> ○ The Program or its partners has a process to identify research needs. ○ The research needs are consistent with CCMP goals and actions. ○ The Program's research needs are approved by the Management Conference.
Minimally Performing	<p>The Program does not meet all of the performance measures in the <i>Fully Performing</i> level.</p>

*The Program has the option to report a "not applicable" for the Research sub-element. However, if not applicable, the Program must include justification that either (1) research is not a priority for the Management Conference, or (2) lack of resources does not allow the Program to conduct or support research efforts.

The EPA expects that, in order to be a *Fully Performing* Program, all baseline expectations are met. Performance measures in the *Good* and *Excellent* levels are **not required**. They are benchmarks for what the Program can do to improve performance given the Program's priorities and organizational capacity.

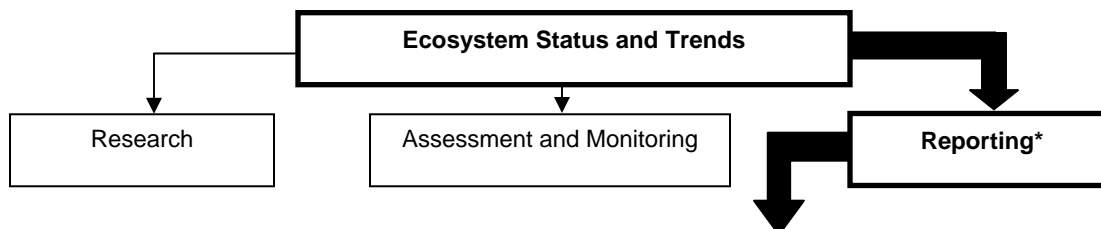
Core Element: Ecosystem Status and Trends
 Sub-element: **Assessment and Monitoring**



LEVEL	PERFORMANCE MEASURES
Excellent	<p>The Program demonstrates <i>Excellent</i> performance because:</p> <ul style="list-style-type: none"> ○ The monitoring plan produces sufficient data to support a comprehensive and integrated analysis of environmental conditions. ○ The Program or its partners seeks more efficient and cost-effective technologies for monitoring as appropriate. ○ The Program trains volunteer groups to improve the quality of data collection.
Good	<p>The Program demonstrates <i>Good</i> performance because:</p> <ul style="list-style-type: none"> ○ The Program uses monitoring data to assess and re-direct management actions and programs implemented under the CCMP as necessary. ○ The monitoring plan has a schedule for review/updates that is approved by the Management Conference. ○ The Program uses monitoring data to identify gaps in knowledge. ○ Available data is analyzed for ecosystem status and trends. ○ The Program promotes the establishment of volunteer monitoring groups to supplement NEP monitoring efforts.
Fully Performing	<p>Baseline expectations:</p> <ul style="list-style-type: none"> ○ The Program has a Scientific and Technical Advisory Committee (STAC) or analogous structure to ensure that Program decision-making is tied to good science. ○ The Program has indicators in use that are recognized by the Management Conference. ○ The Program has a monitoring plan in use that is recognized and/or approved by the Management Conference and: <ul style="list-style-type: none"> ▪ meets QA/QC requirements; ▪ identifies various parties' roles and responsibilities for monitoring; ▪ has a timetable for collecting and reporting on data; and ▪ identifies funding needs and/or commitments for the monitoring program. ○ The monitoring plan produces data to support an analysis of specific environmental conditions.
Minimally Performing	<p>The Program does not meet all of the performance measures in the <i>Fully Performing</i> level.</p>

The EPA expects that, in order to be a *Fully Performing* Program, all baseline expectations are met. Performance measures in the *Good* and *Excellent* levels are **not required**. They are benchmarks for what the Program can do to improve performance given the Program's priorities and organizational capacity.

Core Element: Ecosystem Status and Trends
Sub-element: Reporting*



LEVEL	PERFORMANCE MEASURES
Excellent	The Program demonstrates <i>Excellent</i> performance because: <ul style="list-style-type: none"> ○ Reports discuss adaptive management strategies. ○ Reports recognize new and emerging issues to be considered in updates or revisions to the CCMP.
Good	The Program demonstrates <i>Good</i> performance because: <ul style="list-style-type: none"> ○ The Program has an environmental progress report that communicates ecosystem status and trends to the public every three to five years (e.g., “State of the Bay” report, Environmental Report Card, significant newspaper insert, newsletters, websites, etc.). ○ Major reports: <ul style="list-style-type: none"> ▪ discuss the Program’s goals and priorities, indicators in use, ecosystem status and trends, and maps of study area; ▪ discuss the health of the estuary (i.e., habitat, water quality, and living resources); and ▪ include conceptual models that represent the best understanding of current ecosystem processes.
Fully Performing	Baseline expectations: <ul style="list-style-type: none"> ○ The Program has an environmental progress report that communicates ecosystem status and trends to the public on a periodic basis (e.g., “State of the Bay” report, Environmental Report Card, significant newspaper insert, newsletters, websites, etc.). ○ Major reports: <ul style="list-style-type: none"> ▪ are linked to CCMP actions, goals, priorities, indicators, and monitoring systems; ▪ feature a narrative description of the Program’s study area in plain English explaining the relationship between human activities and impacts on resources; and ▪ are approved by the Management Conference.
Minimally Performing	The Program does not meet all of the performance measures in the <i>Fully Performing</i> level.

*Refers to Reporting of Ecosystem Status and Trends in the Program study area.

The EPA expects that, in order to be a *Fully Performing* Program, all baseline expectations are met. Performance measures in the *Good* and *Excellent* levels are **not required**. They are benchmarks for what the Program can do to improve performance given the Program’s priorities and organizational capacity.

Attachment 3: Annual Funding Guidance Requirements for GPRA Reporting on Habitat Protection and Restoration and CCMP Actions

Habitat Protection and Restoration

WHAT: As part of meeting the Government Performance and Results Act (GPRA) requirements, which measures performance or progress towards established goals, EPA reports on habitat protection and restoration activities within the NEP. One of EPA's strategic targets for restoring and protecting ecosystems is: "By 2008, working with NEP partners, protect and restore an additional 250,000 acres of habitat..." As in previous years, EPA Headquarters request that each NEP report on habitat protection and restoration activities.

HOW TO REPORT: Report habitat protection and restoration information using NEPORT, a web based database that allows for reporting via the internet. Links to NEPORT can be found at: <http://www.epa.gov/owow/estuaries/neport>. The NEPs' EPA Regional Coordinators will do a preliminary review and approval prior to EPA Headquarters approval.

DUE DATE: **Completed habitat protection and restoration reports should be entered into the NEPORT system by September 1.** EPA recognizes that in order to meet the September 1st deadline, the NEP and its partners may have to calculate a total for the reporting year by estimating the number of acres of habitat protected and restored between September 1st and 30th.

FOR MORE INFORMATION: Please contact Nancy Laurson at 202-566-1247.

CCMP Actions

WHAT: As part of meeting the Government Performance and Results Act (GPRA) requirements, which measures performance or progress towards established goals, EPA reports on the number (and title) of total CCMP priority actions as well as those initiated, completed, and on-going. These actions are a general indicator of the range of environmental problems an NEP actively addressed during the reporting period.

HOW TO REPORT: Report CCMP Action information using the standard reporting matrix. This matrix should be submitted electronically to EPA Headquarters at laurson.nancy@epa.gov.

The matrix includes:

- total number of CCMP priority actions;
- number of priority actions initiated;
- number of ongoing priority actions;
- total priority actions completed; and
- cumulative number of priority actions completed to date.

DUE DATE: **A completed electronic CCMP Action matrix should be sent to EPA headquarters by September 1st.**

FOR MORE INFORMATION: Please contact Nancy Laurson at 202-566-1247.

Recommended Matrix, CCMP Priority Actions Initiated & Completed

If an NEP has revisited its priorities in the CCMP, or added new actions, the NEP should indicate this in the submission and provide those revised numbers including new targets. Ongoing actions are those that have been initiated, but are not yet completed. If possible, please submit this matrix in a Microsoft® Excel spreadsheet format.

Total Priority Actions in CCMP	Number and Title of CCMP Priority Actions Initiated This Year	Total Priority Actions Initiated This Year (Since last GPRA report)	Total Percentage of all CCMP Priority Actions Initiated This Year	Target of Priority Actions Initiated by September 30th	Number of Ongoing Priority Actions This Year (Since initial GPRA report)	Number of Total Priority Actions Completed This Year (Since last GPRA report)	Cumulative Number of Priority Actions Completed To Date
25	WQ-3 Reduce Impacts from Stormwater Discharges	1	.04%	15	10	2	7

Attachment 4: Annual Funding Guidance Requirement for Leveraged Resources Report

WHAT: As part of CCMP implementation, each NEP works to ensure its long-term financial sustainability by pursuing leveraging opportunities, i.e., financial or in-kind resources committed above and beyond the Federal funding provided under the Section 320 grant. Leveraged resources include resources that are administered by the NEP and those that are not. As in previous years, EPA Headquarters request that each NEP report on leveraged resources.

HOW TO REPORT: Report leveraged resources information using NEPORT, a web based database that allows for reporting via the internet. Links to NEPORT can be found at: <http://www.epa.gov/owow/estuaries/nepport>. The NEPs' EPA Regional Coordinators will do a preliminary review and approval prior to EPA Headquarters approval.

DUE DATE: **Completed leveraged resources reports should be entered into the NEPORT system by September 1st.** EPA recognizes that in order to meet the September 1st deadline, the NEP and its partners may have to calculate a total for the reporting year by estimating the leveraged resources between September 1st and 30th.

FOR MORE INFORMATION: Please contact Tim Jones at (202) 566-1245.

Definitions of Leveraging Roles and Examples:

Primary role indicates that the NEP played the central role in obtaining leveraged resources. For example, the NEP:

- convened a workgroup that created a stormwater utility;
- wrote a grant proposal that helped fund the implementation of a CCMP action;
- solicited funds and in-kind support for NEP operations (e.g., office space); or
- provided funds to partners for use as match for grants that fund CCMP implementation.

Significant role indicates that the NEP actively participated in, but did not lead the effort to obtain additional resources. For example, the NEP:

- wrote parts of a grant proposal or identified lands for habitat restoration;
- identified lands for habitat restoration that were restored using other sources of funding
- directed other non-NEP resources (e.g., SEP money) to projects;
- established a program such as a local land trust that raised money for CCMP implementation;
- convened or actively participated in a stormwater utility workgroup that subsequently raised funds for CCMP implementation; or
- provided seed money to support a larger project, e.g., a public event.

Support role indicates the NEP played a minor role in channeling resources toward CCMP implementation. For example, the NEP:

- wrote a letter of support for a partner grant application or included habitat acquisition as a CCMP action, but other entities raised funds and identified lands for acquisition;
- wrote a letter in support of a partner's grant proposal; or
- included habitat acquisition as a CCMP action, but other entities raised funds and identified lands for acquisition.

**Attachment 5: Annual Funding Guidance request for Clean Water Act (CWA)
Implementation Support Information**

WHAT: The use of the Clean Water Act (CWA) tools is a central part of watershed protection. The collaborative nature of the NEP and of CCMP implementation results in partnerships with state and local governments who are the lead implementers of the CWA programs. As a result, the NEP plays a role in bringing about environmental improvements through the use of the CWA tools. As in previous years, EPA requests that each NEP report on CWA implementation.

HOW TO REPORT: Please summarize CWA implementation in the NEP annual workplans and provide additional detail based on the definitions below.

DUE DATE: A summary of the CWA implementation is due as part of your annual workplan on June 30th.

FOR MORE INFORMATION: Please contact Noemi Mercado at 202-566-1251.

CWA Programs:

- Strengthening Water Quality Standards
- Improving Water Quality Monitoring
- Developing Total Maximum Daily Loads (TMDLs)
- Controlling Nonpoint Source Pollution on a Watershed Basis
- Strengthening National Pollutant Discharge Elimination System (NPDES) Permits
- Supporting Sustainable Wastewater Infrastructure

Definitions of CWA Collaborative Roles:

“Primary role” indicates that the NEP played the central role in implementing the CWA tool. For example, the NEP listed water bodies as impaired thru the program’s monitoring efforts.

“Significant role” indicates that the NEP actively participated in but did not lead the effort to implement the CWA tool. For example, the NEP works with another partner to map wetlands in the watershed.

“Support role” indicates the NEP played a minor role in implementing the CWA tool. For example, the NEP coordinates training on TMDLs.

Expected Outcomes:

Include narrative on the expected outcome(s) from using a CWA tool.

Attachment 6: Group A Program Evaluation Schedule (Period covered: FY 2004 – 2006)
Barataria-Terrebonne, Casco Bay, Coastal Bend Bays, Indian River Lagoon, Massachusetts Bay, Peconic Bay, San Juan Bay, Tampa Bay, Tillamook Bay

November 9, 2007	NEP Directors should determine whether they can volunteer to serve on a PE team and notify Noemi Mercado.
November 16, 2007	EPA HQ will set up PE teams for Group A NEPs.
December 3, 2007	Deadline for PE team leader to hold a conference call with members of the team and the NEP Director to clarify questions related to the new PE Guidance and discuss logistics on the preparation and submission of the PE package among other issues.
February 28, 2008	<p>Due date for PE submittal package. A total of six copies are needed (one for each of four EPA members of the PE team, one for the ex-officio NEP Director and one file copy for Noemi Mercado). Two copies of the PE submittal should be sent directly to each NEP's respective EPA Regional Coordinator (see Attachment 10). The copy for the ex-officio NEP Director should be sent directly to that Director. The remaining three copies should be sent to Noemi Mercado at EPA HQ.</p> <p>The PE team leader sends electronic copies of NEP workplans for years 2004 – 2006 to the PE team.</p>
March 25, 2008	Deadline for PE team leaders to hold a conference call for the PE team members to compare notes after reviewing the PE package and submitting written comments to the PE team leader.
April 11, 2008	Deadline for PE team leaders to hold a conference call with the NEP Director and the PE team to discuss additional documentation needs, schedule the on-site visit, and identify issues that should be addressed during the on-site visit.
April 14 - July 1, 2008	Period for on-site visits.
July 16, 2008	Deadline for PE team leaders to hold a conference call with the NEP Director and the PE team to allow the Director the opportunity to address any concerns raised during the on-site visit.
July 30, 2008	Deadline for team leader to prepare draft letter documenting the PE team's findings, recommendations, and rating.
August 13, 2008	Deadline for NEP Director to review and provide comments on draft letter.
August 27, 2008	Revised draft letter provided to EPA HQ and Regional Branch Chiefs (or appropriate Regional Manager) for review and formal concurrence.
September 30, 2008	Deadline for concurrence and signature by CMB Branch Chief and OCPD Director.

Attachment 7: Group B Program Evaluation Schedule (Period covered: FY 2005 - 2007)
Albemarle-Pamlico Sounds, Buzzards Bay, Delaware Inland Bays, Galveston Bay, Long Island Sound, Narragansett Bay, New York/New Jersey Harbor, Partnership for the Delaware Estuary, Santa Monica Bay, Sarasota Bay

November 7, 2008	NEP Directors should determine whether they can volunteer to serve on a PE team and notify to the PE Coordinator at EPA HQ.
November 14, 2008	EPA HQ will set up PE teams for Group B NEPs.
December 5, 2008	Deadline for PE team leader to hold a conference call with members of the team and the NEP Director to determine if existing reports fully address the PE questions and identify questions that call for additional documentation among other issues.
March 2, 2009	<p>Due date for PE submittal package. A total of six copies are needed (one for each of four EPA members of the PE team, one for the ex-officio NEP Director and one file copy for EPA HQ). Two copies of the PE submittal should be sent directly to each NEP's respective EPA Regional Coordinator (see Attachment 10). The copy for the ex-officio NEP Director should be sent directly to that Director. The remaining three copies should be sent to the PE Coordinator at EPA HQ.</p> <p>The PE team leader sends electronic copies of NEP workplans for years 2005 – 2007 to the PE team.</p>
March 27, 2009	Deadline for PE team leaders to hold a conference call for the PE team members to compare notes after reviewing the PE package and submitting written comments to the PE team leader.
April 10, 2009	Deadline for PE team leaders to hold a conference call with the NEP Director and the PE team to discuss additional documentation needs, schedule the on-site visit, and identify issues that should be addressed during the on-site visit.
April 13 - July 3, 2009	Period for on-site visits.
July 17, 2009	Deadline for PE team leaders to hold a conference call with the NEP Director and the PE team to allow the Director the opportunity to address any concerns raised during the on-site visit.
July 31, 2009	Deadline for team leader to prepare draft letter documenting the PE team's findings, recommendations, and rating.
August 14, 2009	Deadline for NEP Director to review and provide comments on draft letter.
August 28, 2009	Revised draft letter provided to EPA HQ and Regional Branch Chiefs (or appropriate Regional Manager) for review and formal concurrence.
September 30, 2009	Deadline for concurrence and signature by CMB Branch Chief and OCPD Director.

Attachment 8: Group C Program Evaluation Schedule (Period covered: FY 2006 – 2008)
Barnegat Bay, Charlotte Harbor, Columbia River, Maryland Coastal Bays, Mobile Bay, Morro Bay, New Hampshire Estuaries, Puget Sound, San Francisco Estuary

November 6, 2009	NEP Directors should determine whether they can volunteer to serve on a PE team and notify to the PE Coordinator at EPA HQ.
November 20, 2009	EPA HQ will set up PE teams for Group C NEPs.
December 4, 2009	Deadline for PE team leader to hold a conference call with members of the team and the NEP Director to determine if existing reports fully address the PE questions and identify questions that call for additional documentation among other issues.
March 1, 2010	<p>Due date for PE submittal package. A total of six copies are needed (one for each of four EPA members of the PE team, one for the ex-officio NEP Director and one file copy for the PE Coordinator at EPA HQ). Two copies of the PE submittal should be sent directly to each NEP's respective EPA Regional Coordinator (see Attachment 10). The copy for the ex-officio NEP Director should be sent directly to that Director. The remaining three copies should be sent to the PE Coordinator at EPA HQ.</p> <p>The PE team leader sends electronic copies of NEP workplans for years 2006 – 2008 to the PE team.</p>
March 26, 2010	Deadline for PE team leaders to hold a conference call for the PE team members to compare notes after reviewing the PE package and submitting written comments to the PE team leader.
April 9, 2010	Deadline for PE team leaders to hold a conference call with the NEP Director and the PE team to discuss additional documentation needs, schedule the on-site visit, and identify issues that should be addressed during the on-site visit.
April 12 - July 2, 2010	Period for on-site visits.
July 16, 2010	Deadline for PE team leaders to hold a conference call with the NEP Director and the PE team to allow the Director the opportunity to address any concerns raised during the on-site visit.
July 30, 2010	Deadline for team leader to prepare draft letter documenting the PE team's findings, recommendations, and rating.
August 13, 2010	Deadline for NEP Director to review and provide comments on draft letter.
August 27, 2010	Revised draft letter provided to EPA HQ and Regional Branch Chiefs (or appropriate Regional Manager) for review and formal concurrence.
September 30, 2010	Deadline for concurrence and signature by CMB Branch Chief and OCPD Director.

Attachment 9: Responsibilities for the Parties involved in the Program Evaluation Process

EPA HQ:

- HQ Program Evaluation (PE) coordinator
 - oversee PE process
 - set up PE teams
 - distribute NEP PE package
 - send final PE letter to the NEPs
 - summarize the PE findings
- HQ NEP coordinators should provide assistance to NEPs, such as help interpreting the PE Guidance and/or feedback on the draft PE package, upon request
- PE team leader
 - schedule conference calls with members of the team and the NEP Director
 - send electronic copies of the NEP workplans for the years covered within the PE cycle to the members of the team
 - review the NEP PE package
 - collect electronic comments from members of the team
 - coordinate and conduct the on-site visit
 - draft the PE letter for review and signature by OCPD Director

EPA Regions:

- provide assistance to NEPs, such as help interpreting the PE Guidance and/or feedback on the draft PE package, upon request
- PE team member
 - participate on conference calls
 - review the NEP PE package
 - submit electronic comments to the PE team leader
 - participate in the on-site visit
 - review and concur with the draft PE letter

Ex-officio NEP Director:

- participate on conference calls
- review the NEP PE package
- submit written comments to the PE team leader
- participate in the on-site visit
- provide technical transfer assistance to the NEP undergoing the PE, as well as be open to receiving insight from the NEP undergoing the PE
- review and concur with the draft PE letter

NEPs undergoing the PE:

- prepare and submit the PE package to EPA HQ and Regions by February 28th
- participate on conference calls
- address the PE team comments and provide any additional information requested by the PE team
- host the NEP on-site visit

Attachment 10: EPA Regional Coordinators

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