

Presented at

Great Rivers Reference Condition Workshop

January 10-11, Cincinnati, OH

Sponsored by

The U.S. Environmental Protection Agency and The Council of State Governments




EMAP
Great River Ecosystems



U.S. EPA Office of Research and Development

Environmental Monitoring and Assessment Program

A photograph of a man in a boat holding a large fish. He is wearing a light-colored cap, sunglasses, and a green vest over a grey shirt. Another person is leaning over the side of the boat, looking at the fish. The background shows a river and a forested bank.

**THE DEVELOPMENT AND APPLICATION OF
BIOLOGICAL ASSESSMENT TOOLS AND
BIOCRITERIA FOR THE ASSESSMENT OF
IMPACTS TO AQUATIC ASSEMBLAGES IN
LARGE, NON-WADEABLE RIVERS**

**EMAP GRE Reference Condition Workshop
January 11, 2006**

**Chris O. Yoder
Center for Applied Bioassessment and Biocriteria
Midwest Biodiversity Institute
Columbus, OH**

**Susan P. Davies
Maine DEP
Augusta, ME**

Cooperative Agreements With U.S. EPA

- Cooperative agreements between MBI & CABB and U.S. EPA – initiated Oct. 2000 and Aug. 2001.
- Promote and demonstrate the role of biological assessment and criteria in WQ management.
- Examine relationships between biological criteria and biotic and abiotic stressors.
- Regional biocriteria development in streams and large rivers.

**US EPA Science
Forum**



May 5 - 7, 2003

Washington DC

**30 Years of Progress
Through Partnerships:**

Biological Indicators

Susan Jackson, US EPA Biological Criteria Program

What Is *Adequate* Monitoring & Assessment (M&A)?

- Biological, chemical, & physical indicators.
- Adherence to stressor, exposure, response roles – *avoid use of surrogates*.
- Data Quality Objectives adequate for the intended purpose (should be defined by WQS).
- Design (scale, sequence, intensity) meets *multiple* management issues and needs.
- The product of M&A is the assessment, not just the data (avoid data rich, information poor syndrome).
- Professionalism – expertise in key disciplines

**Fundamentals of
Aquatic Ecology:
Applying Readily**

**Available Use Concepts and
Elements of Adequate
Watershed Monitoring
and Assessment**

**Develop and Use
Biological, Chemical,
& Physical Indicators
and Criteria**

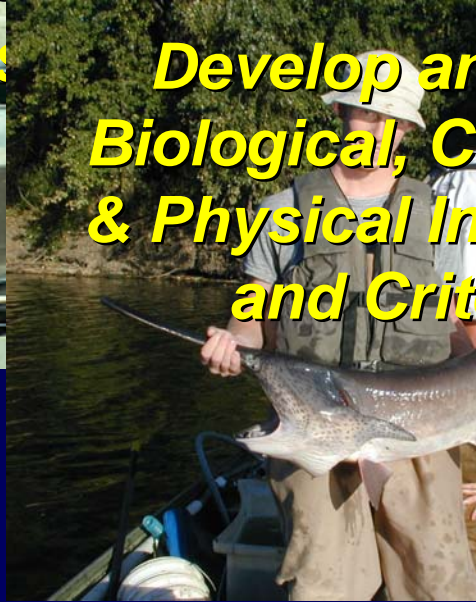
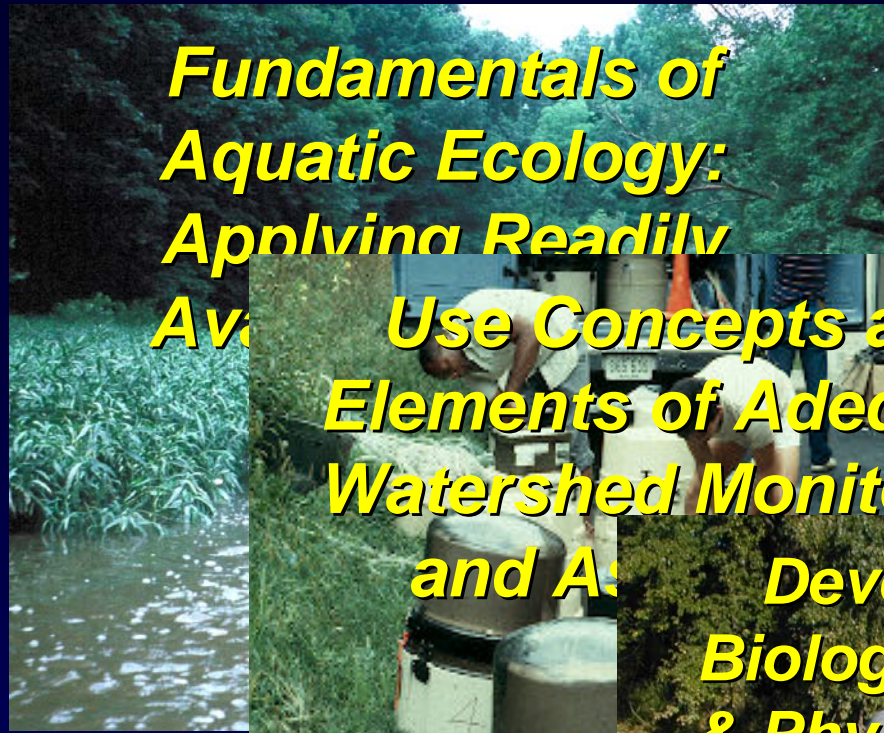
**A Systematic
Process**

**Employ Tools via
Integrated
Assessments**

Stressors

Exposure

Response

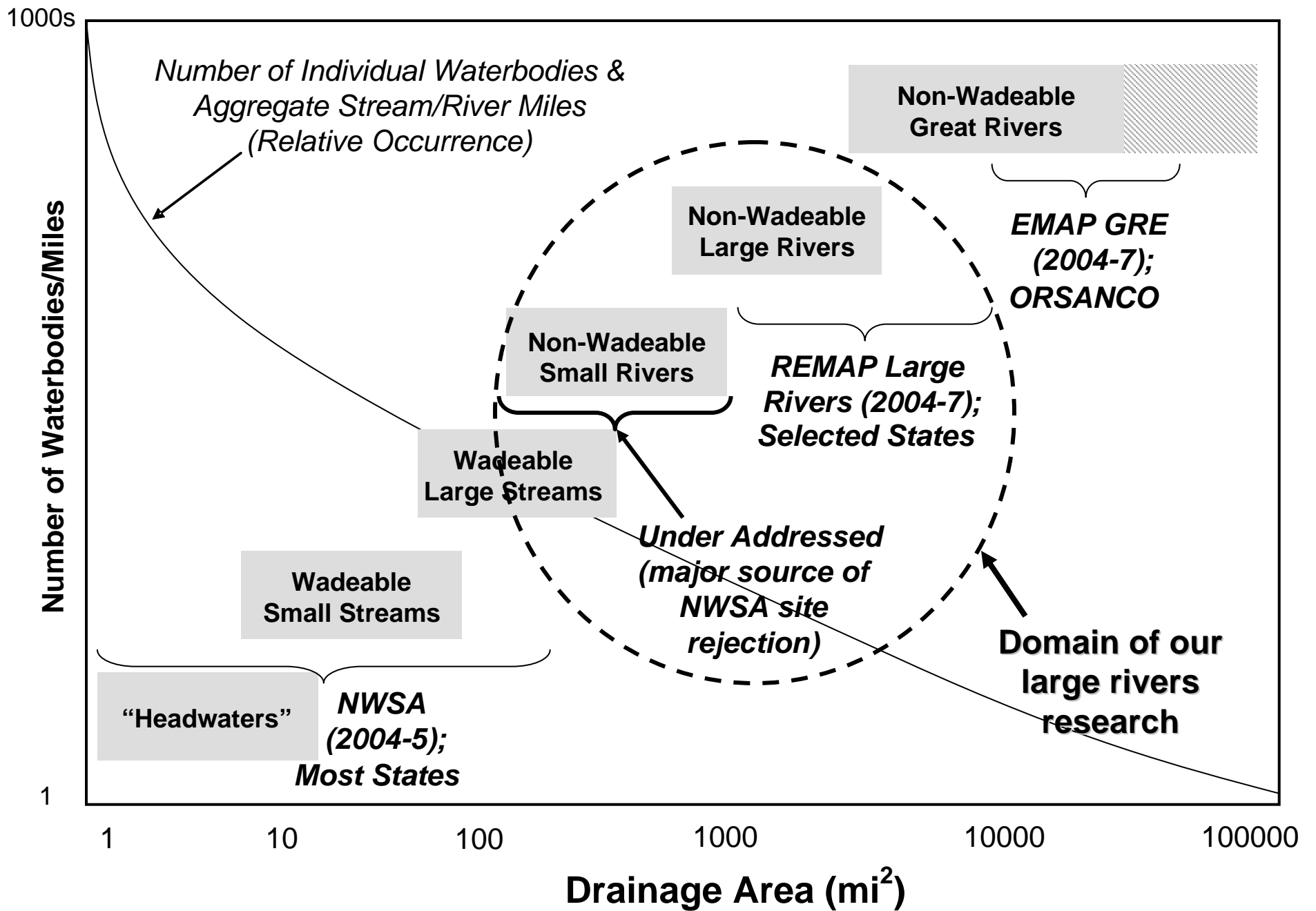


Three Principal Objectives of Systematic Bioassessment

- **Determine if use designations are appropriate and attainable**
- **Determine condition and status of the resource (including causal associations)**
- **Are changes taking place over time?**

Issues of Large River Bioassessment

- **Methods Issues** – comparability, accuracy
- Bioassessment – calibration, validation
- Status and trends – sites, reaches, segments
- Scale issues – how much of a large river needs to be assessed?
- Local vs. reach scale issues.
- **Support of multiple water quality & resource management objectives** – will require consideration of multiple sampling designs.



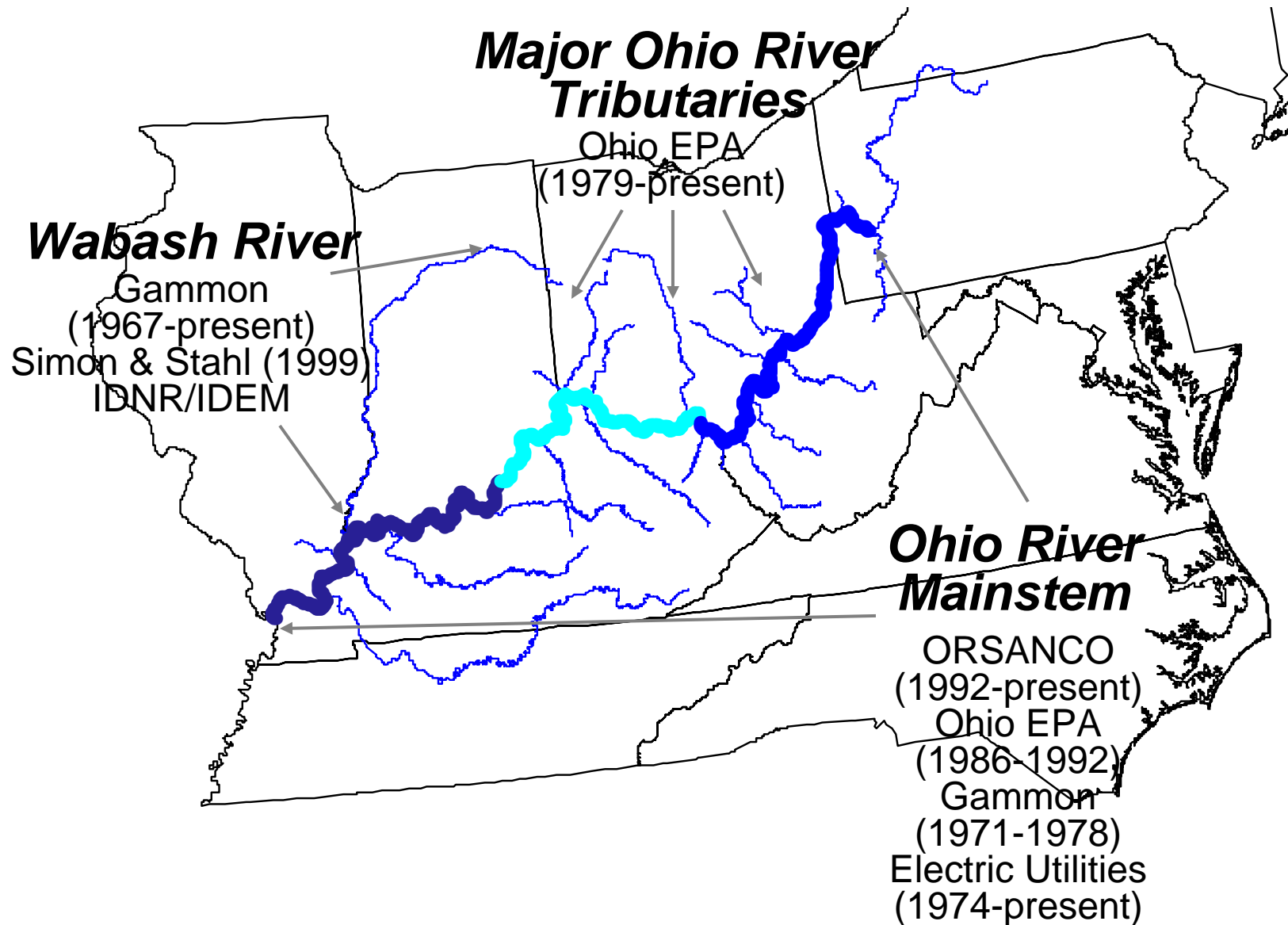
Fish Assemblage Sampling Methods



Single Gear Approach:

- Pulsed D.C. electrofishing
- Smith-Root 5.0 GPP – 5kw, 500-1000v, 4-12A, 120 Hz
- Boat-mounted - 16' john boat, custom built (\$15K complete)
- Gang droppers (+), 8' cathodes (-) – adjust to conductance
- Standard distance, all macrohabitats
- Daytime in river, nighttime in impoundments

Fish Assemblage Assessments of Large and Great Rivers in the Upper Ohio Basin



Midwest Large River Programs:

- **ORSANCO** – night electrofishing, IBI developed; macroinvertebrate method in development; in process of adopting in standards.
- **Wisconsin** – daytime electrofishing, IBI developed; exploring macroinvertebrate methods; not in WQS.
- **Ohio EPA** – daytime electrofishing, IBI developed; macroinvertebrate method and index established; adopted in WQS.
- **Other Region V States** – most have developmental projects underway; some conduct assessments.

Ohio EPA Non-Wadeable Methods



**Electrofishing Gear Array:
Wadeable to Non-Wadeable**



Effort: Distance Sampled



**Logistics: Equipment &
Access Issues**



Multiple Habitats Sampled

ELECTROFISHING METHODS

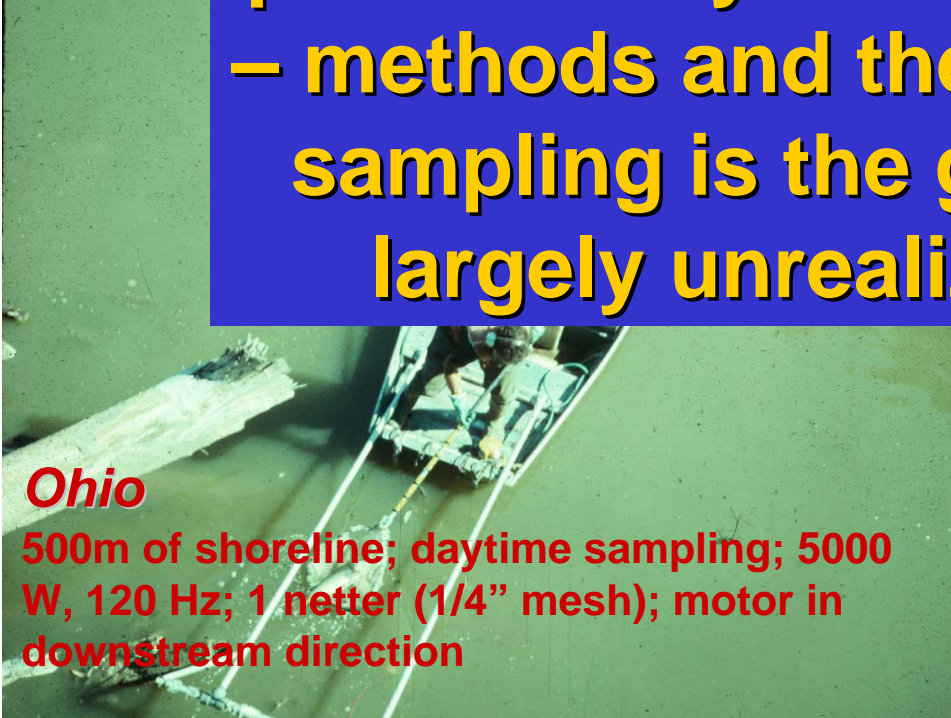
The concern is about the comparability *and* accuracy of the resulting assessment of environmental quality that are produced by the States and others – methods and the execution of the sampling is the genesis of some largely unrealized problems.



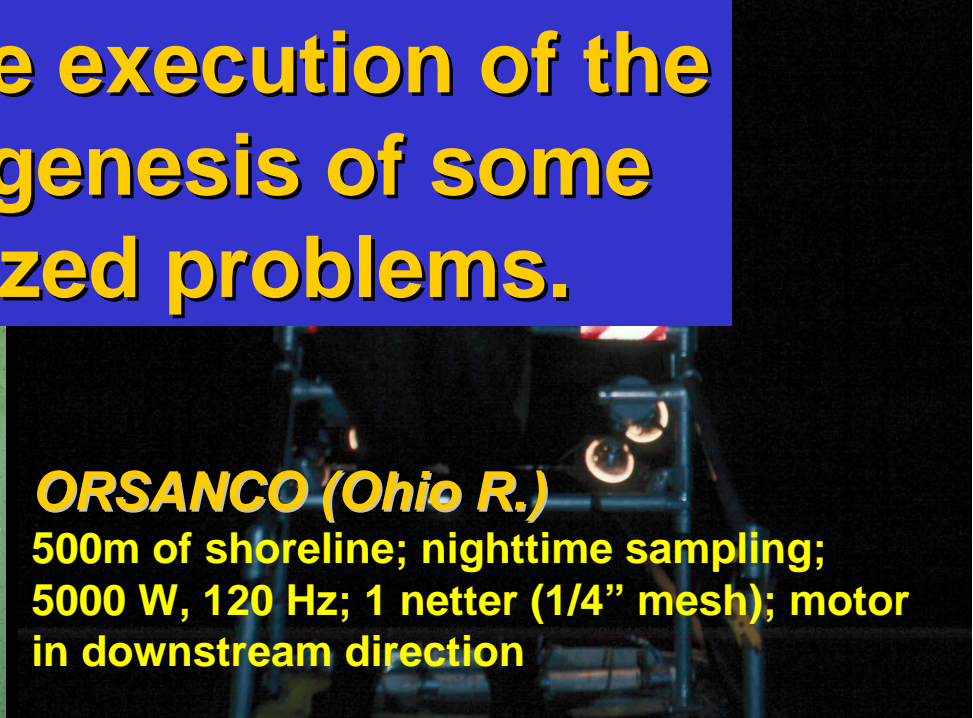
Wisconsin
One mile
3000 W,
motor in



ie
r (1/4"
on



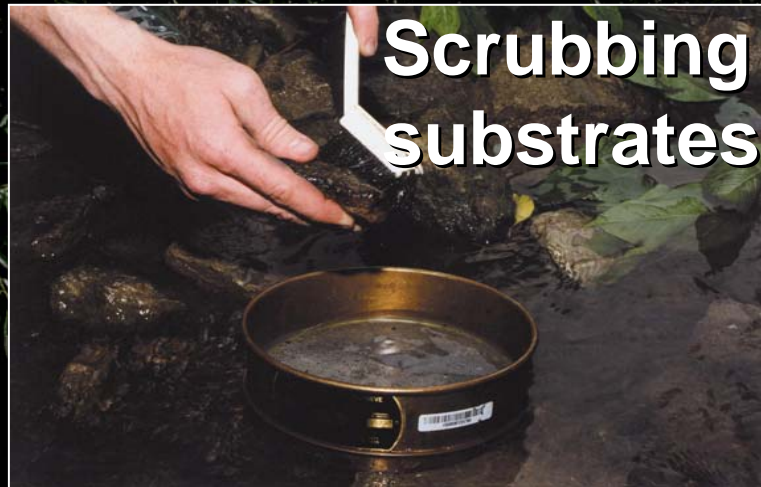
Ohio
500m of shoreline; daytime sampling; 5000
W, 120 Hz; 1 netter (1/4" mesh); motor in
downstream direction



ORSANCO (Ohio R.)
500m of shoreline; nighttime sampling;
5000 W, 120 Hz; 1 netter (1/4" mesh); motor
in downstream direction

Benthic Macroinvertebrates

Active Sampling Methods Examples



**Net-based methods
(including kicks,
dips, jabs, sweeps,
& picks)**

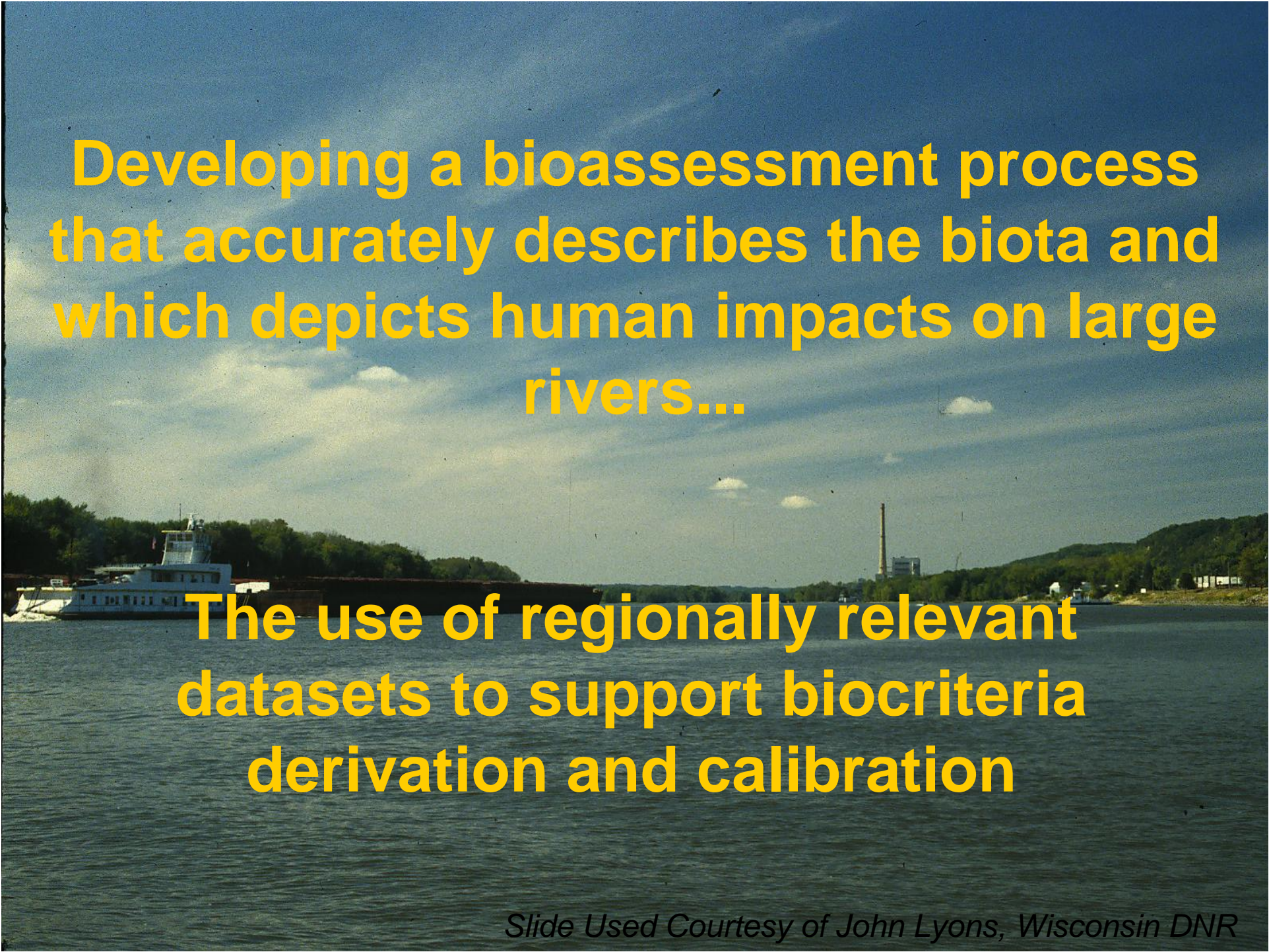


Benthic Macroinvertebrates

Passive Sampling Methods Examples

- Quantitative
 - Ohio-EPA
artificial substrates
 - Maine DEP
rock baskets
 - **Each state has
sampled large
rivers for >25 years**





**Developing a bioassessment process
that accurately describes the biota and
which depicts human impacts on large
rivers...**

**The use of regionally relevant
datasets to support biocriteria
derivation and calibration**

Slide Used Courtesy of John Lyons, Wisconsin DNR

Three Projects beginning in 2004:

1. Fish assemblage methods comparison – direct field comparison with State, Municipal, and other orgs.
2. REMAP Large Rivers – eleven large river tribs. to Upper Miss. & Ohio R. (5 states) – probability design.
3. Application of EPA TALU concepts to non-wadeable rivers – targeted sampling of specific reaches.

for Selected Watersheds
in the Midwestern States *

St. Croix River
7691.0 Sq. Mi.

Mississippi Headwaters
20,100.3 Sq. Mi.

Minnesota River
16,950.8 Sq. Mi.

Chippewa River
9557.5 Sq. Mi.

Wisconsin River
12,036.3 Sq. Mi.

Rock River
10,916.1 Sq. Mi.

Illinois River
28,813.1 Sq. Mi.

Muskingum River
8051.2 Sq. Mi.

Scioto River
6517.5 Sq. Mi.

Wabash River
32,954.2 Sq. Mi.

* Area calculations are based on 11-digit HUC watersheds, except for Missouri River, which was calculated using USGS 8-digit HUCs.





Example of a project that started from "scratch"

Kennebec River (2002-5)

- Wyman Dam to Merrymeeting Bay (30 sites, 2 test areas)
- Follow-up Waterville to Augusta (2002-5)
- Atl. salmon nursery habitat survey (2003)

Androscoggin River (2003)

- Errol, NH to Merrymeeting Bay (51 sites)

Sebasticook River (2003)

- Douglas Pond to Winslow (9 sites)

Penobscot River (2004)

- N. Br. To Hamden (40 sites); included W. tributaries

- Allagash (5 sites), ... Croix (12 sites)

Cooperators

- U.S. EPA, Region I
- U.S. EPA, HECD
- Maine DEP
- Maine DIFW
- Maine DMR
- Maine ASC
- U.S. F&WS
- Penobscot Indian Nation
- Trout Unlimited
- St. Croix IWC
- Maine DOC
- NFWF
- GOMCME
- SRWA

Table 1. Key characteristics of a boat electrofishing protocol applicable to Maine and New England large river habitats.

Category/Attribute	Riverine Wadeable ^a (Low-Mod. Cond. ^b)	Riverine High Gradient (Low Cond.)	Riverine Mod. Gradient (Low Cond.)	Riverine Low Gradient (Mod. Cond.)	Impounded (Mod. Cond.)	Impounded (Mod. Cond.)	Tidal (High Cond.)
1. Drainage Area	<500 mi ²	<500 mi ²	>500-1000 mi ²	>1000 mi ²	NA	NA	NA
2. Platform	Georator ^c (bank set/towboat)	14' raft ^d or 12' johnboat	16' johnboat or 16' raft ^e	16' johnboat	16' johnboat	16' johnboat	16' johnboat
3. Crew Size	3 persons (2 netters)	2 persons (1 netter)	3 persons (2 netters)	3 persons (2 netters)	3 persons (2 netters)	3 persons (2 netters)	3 persons (2 netters)
4. Electrofishing Unit	GPP 2.5, 5.0 ^e or equivalent	GPP 2.5, 5.0 or equivalent	GPP 5.0 or equivalent	GPP 5.0 or equivalent	GPP 5.0 or equivalent	GPP 5.0 or equivalent	GPP 5.0 or
5. Power Source	2500-5000 Watt Alternator	5000 Watt Alternator	5000 Watt Alternator	5000 Watt Alternator	5000 Watt Alternator	5000 Watt Alternator	5000 Watt Alternator
6. Unit Settings ^f	High 120 Hz	High 120 Hz	High 120 Hz	Low or High 120 Hz	High 120 Hz	Low or High 120 Hz	Low 120 Hz
(% of Low or High Range)	NA	2-4 Amperes (100%)	2-4 Amperes (100%)	4-8 Amperes (60-100%)	2-4 Amperes (100%)	4-8 Amperes (60-100%)	>8-15 Amperes (50-80%)
7. Anodes ^g	Net Ring	2 gangs	3 gangs	3 gangs	3 gangs	3 gangs	2 gangs
8. Cathodes	rat tail	6'	8'	8'	8'	8'	8'
9. Sampling Direction & Distance	Upstream 0.2-0.5 Km	Downstream 0.5-1.0 Km	Downstream 1.0 Km	Downstream 1.0 Km	Downstream 1.0 Km	Downstream 1.0 Km	Downstream 1.0Km
10. CPUE ^h Basis	Per 0.5 Km	Per Km	Per Km	Per Km	Per Km	Per Km	Per Km
11. Time Sampled ⁱ	Not tested	3500-4500 s	4000-5500 s	3500-4500 s	3000-4000 s	3000-4000 s	3500-4500 s
12. Time of Day	Day	Day	Day	Day	Day or Night	Day or Night	Day

^a Wadeable defined as sites where a raft or boat mounted apparatus cannot be used due to shallowness of depth – accessibility is not a criterion.

^b Typical relative conductivity ranges: Low (15-40 $\mu\text{s}/\text{m}^2$); Moderate (40 – 200 $\mu\text{s}/\text{m}^2$); High (>200 $\mu\text{s}/\text{m}^2$).

^c Employs a primary net ring as the anode that is operated by the primary netter backed by an assist netter - the unit is either bank set or towed on a small skiff (towboat).

^d This platform was extensively tested in 2005.

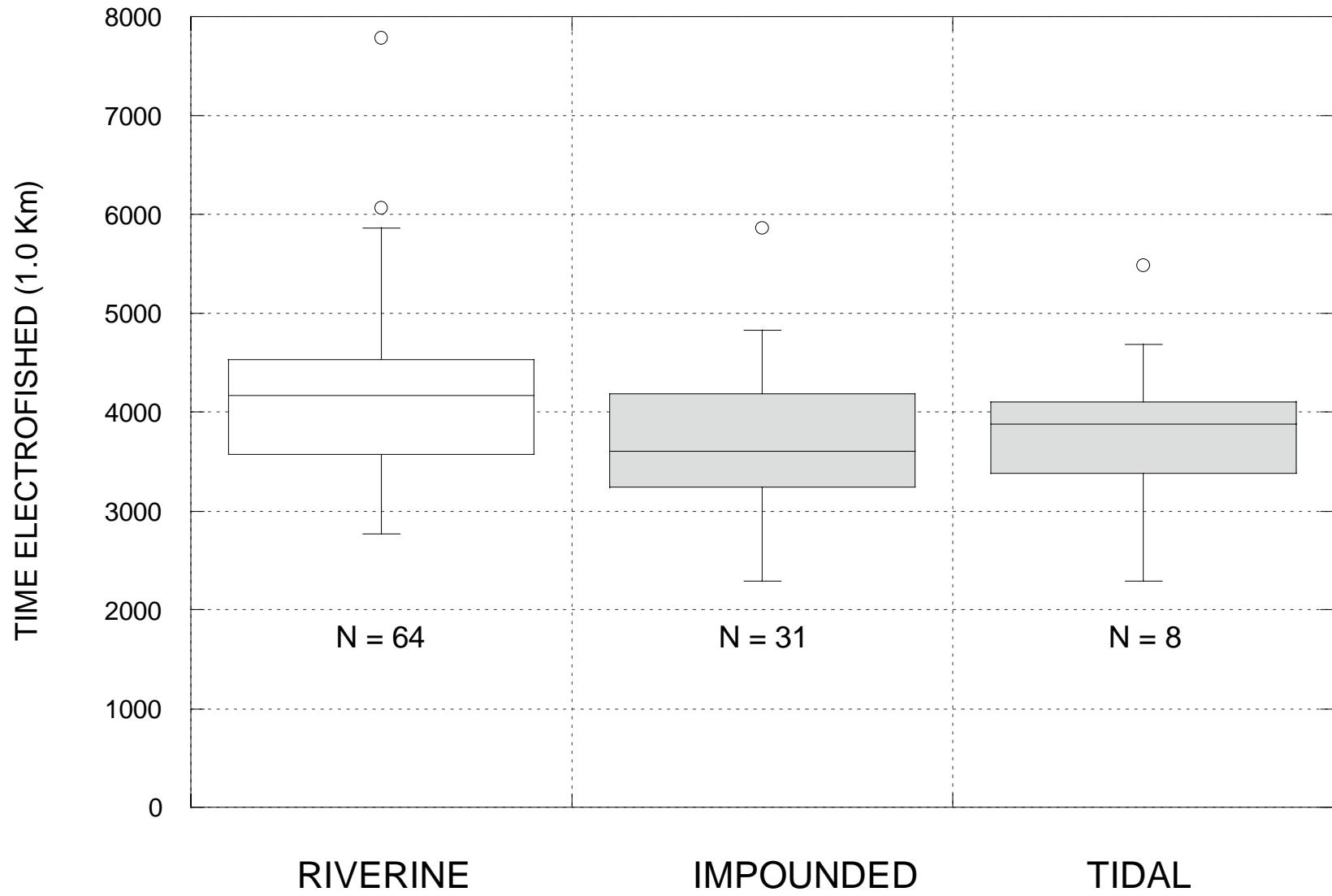
^e This platform has not been tested in Maine, but it has worked well elsewhere and in similar conditions.

^f This does not constitute an endorsement of a particular brand or product name and is for methodological identification only.

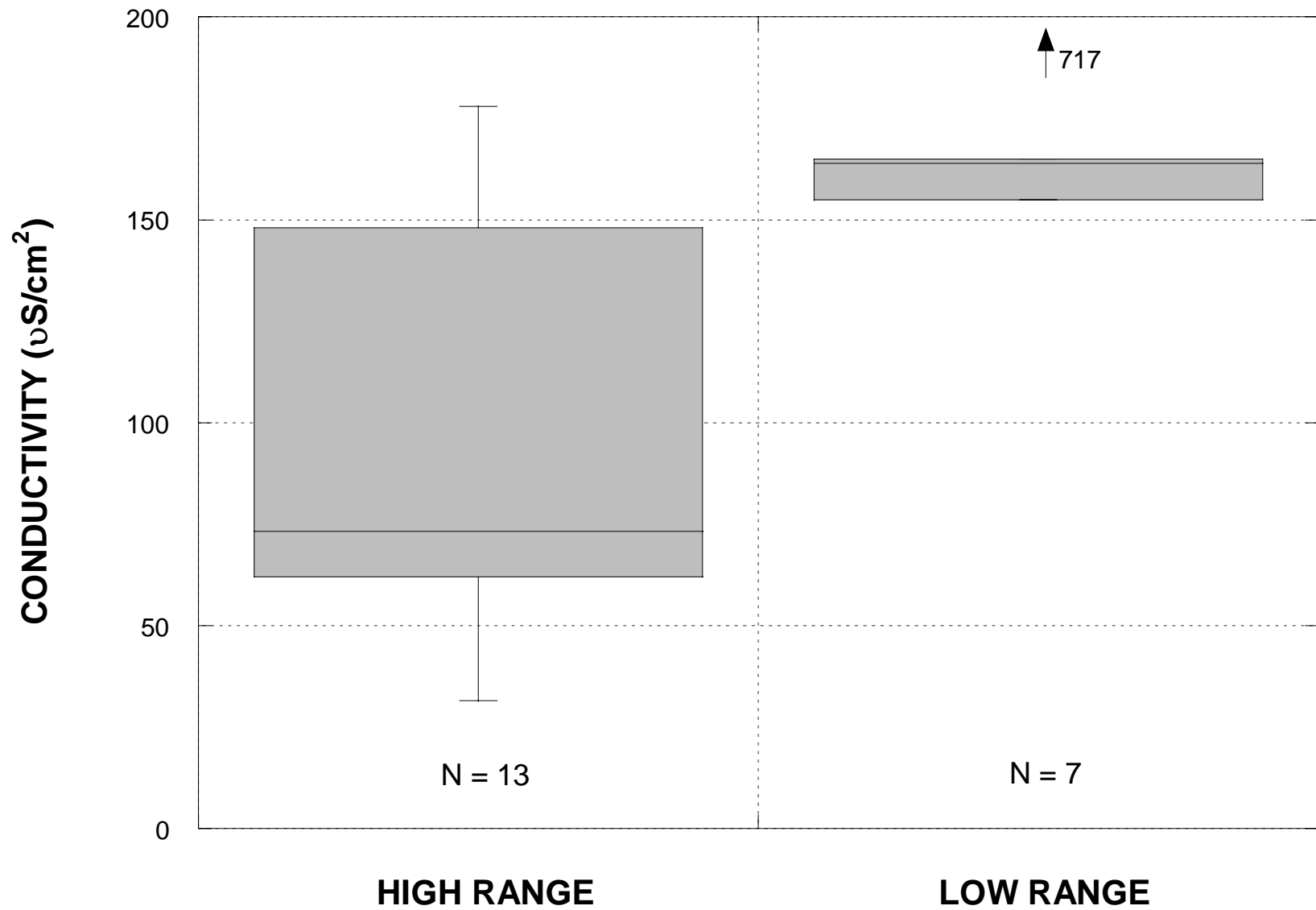
^g Unit settings are selected to produce the highest voltage and amperage output; these are what typically worked in each conductivity range and habitat type.

^h Anodes consist of gangs or multiple strands of wire as described under Equipment Specifications.

MAINE RIVERS TIME ELECTROFISHED (2002-3)



MAINE RIVERS ELECTROFISHING (2002-3)



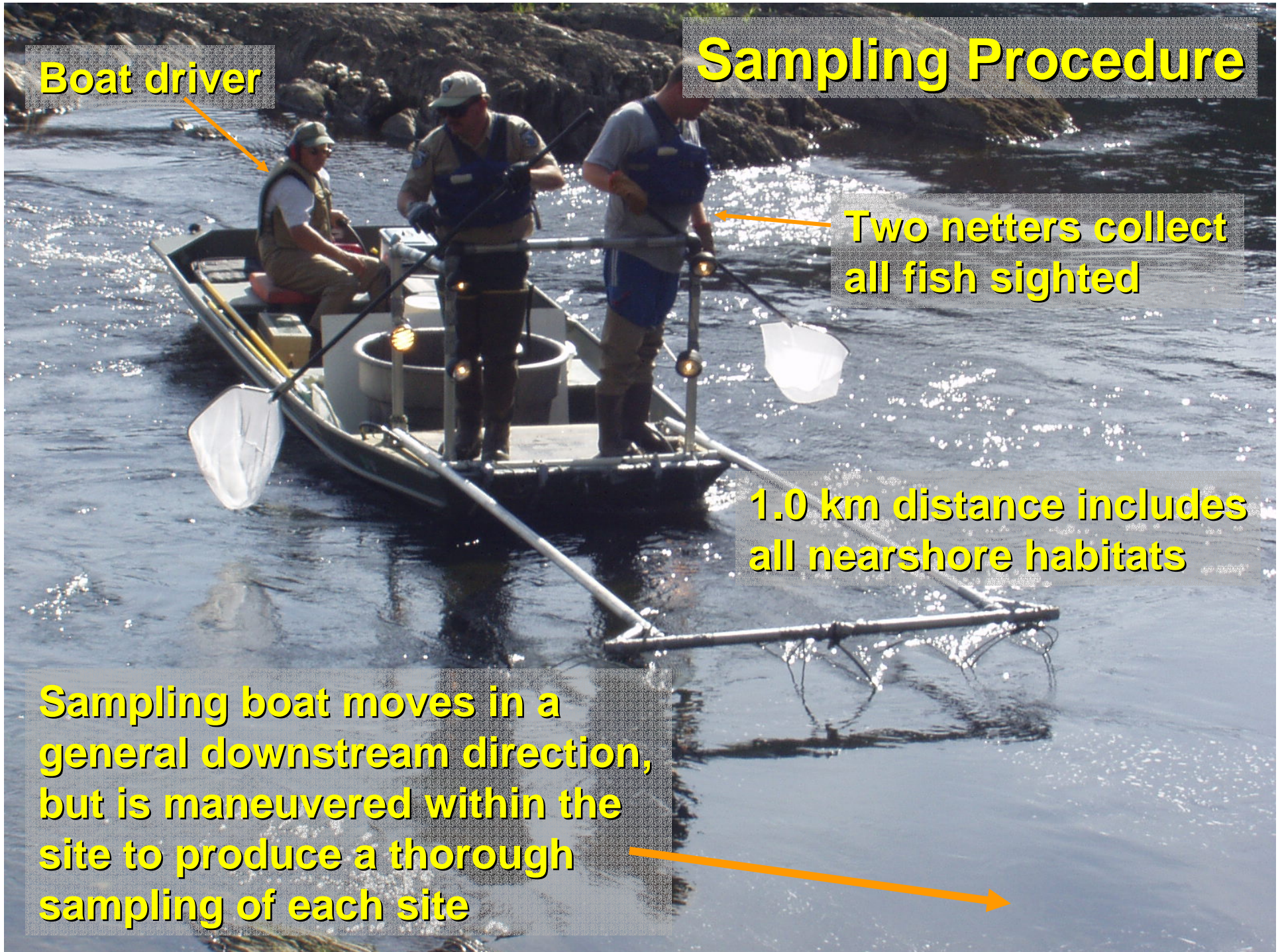
Sampling Procedure

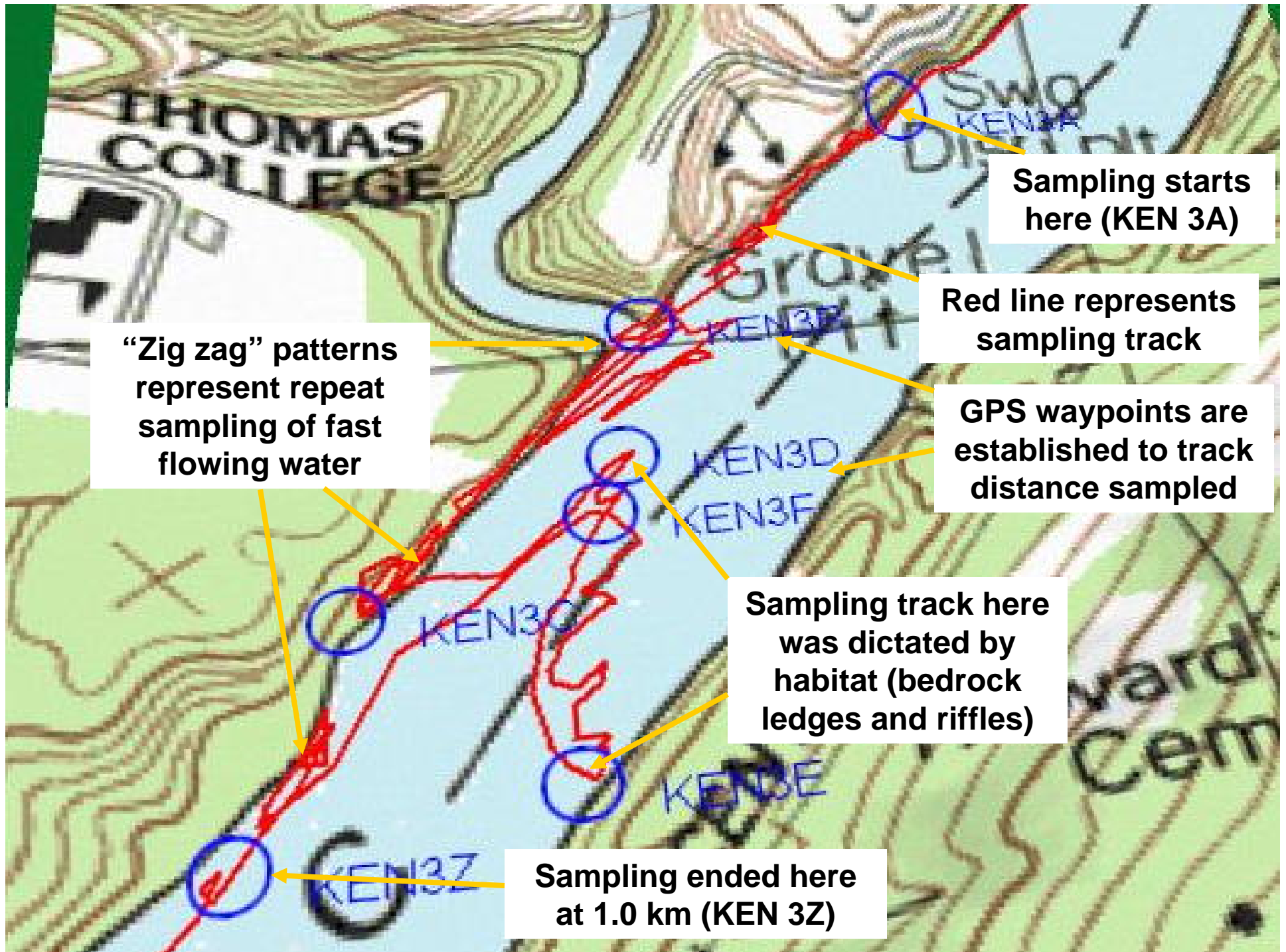
Boat driver

Two netters collect all fish sighted

1.0 km distance includes all nearshore habitats

Sampling boat moves in a general downstream direction, but is maneuvered within the site to produce a thorough sampling of each site









14 ft. Electrofishing Raft



Two Person Crew

“Intermediate” Size River Equipment



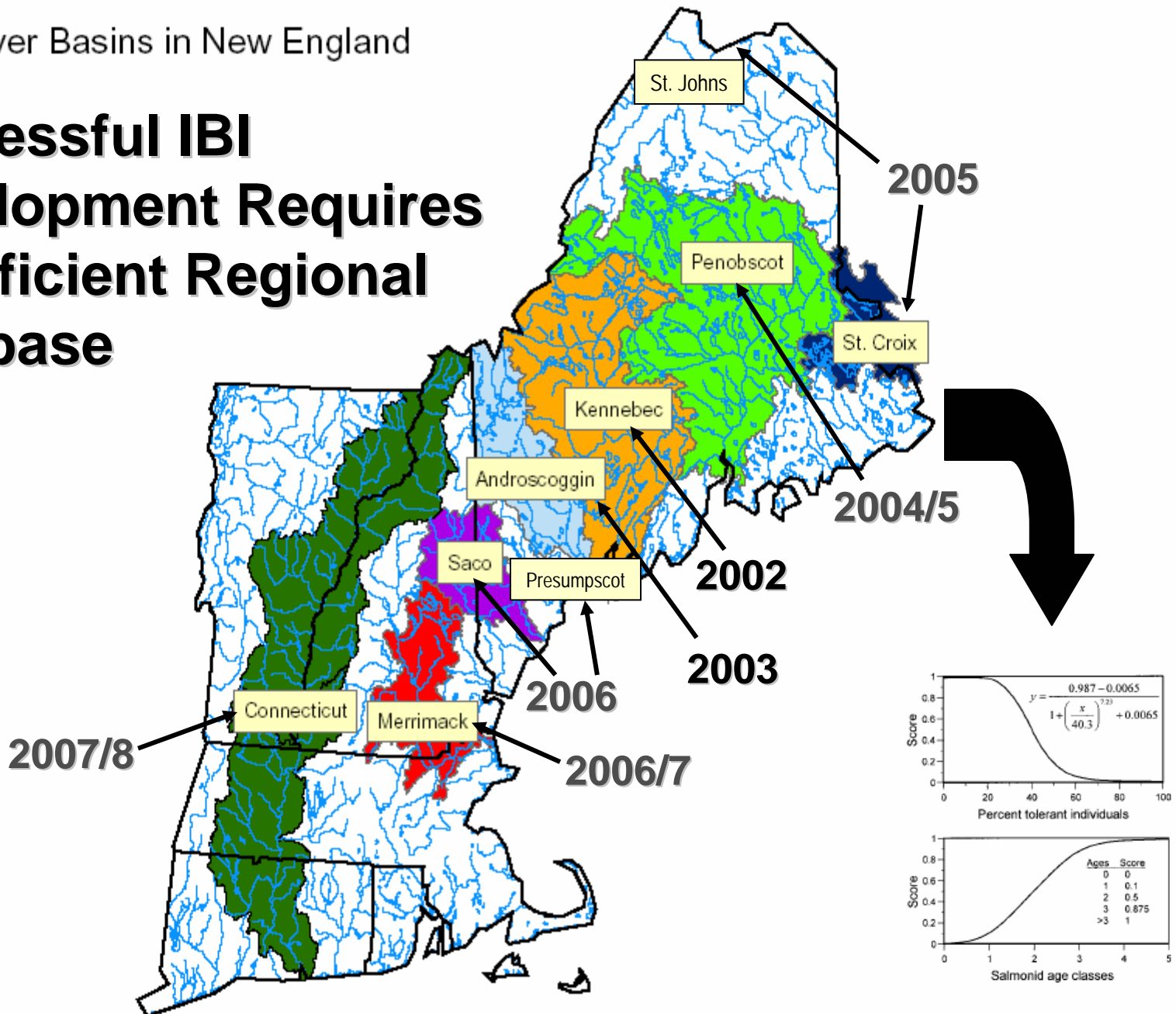
Launching & Retrieving



Smith-Root 2.5 GPP Unit

Major River Basins in New England

Successful IBI Development Requires a Sufficient Regional Database





Tiered Aquatic Life Uses: A Tool for Ecosystem Management

Hydrologic Alteration and Ecological Communities in the East

Amherst, MA, UMASS and TNC

October 20, 2005

Susan Davies, State of Maine, and Susan Jackson, U.S. EPA



United States
Environmental Protection
Agency

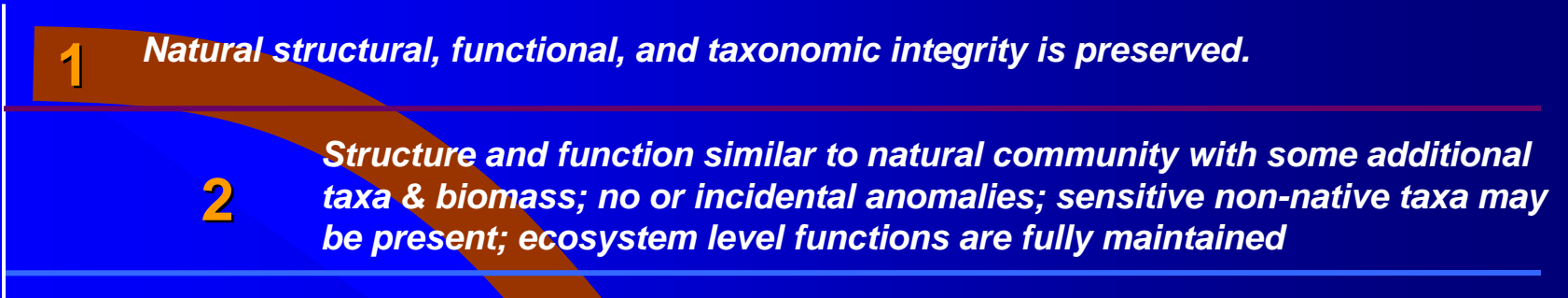
Use of Biological Information to Tier Designated Aquatic Life Uses in State and Tribal Water Quality Standards

August 2005

**REVIEW
DRAFT**

Tiered Aquatic Life Use Conceptual Model: Draft Biological Tiers

Condition of the Biotic Community
[Specific to Ecotype]



The Biological Condition Gradient:
A conceptual model for interpreting detrimental change in aquatic ecosystems

Susan P. Davies and Susan K. Jackson
(Ecological Applications [in press])



LOW — Human Disturbance Gradient —> HIGH

Biological Criteria: I

- Narrative ratings or numerical values which are based on the numbers and kinds of aquatic organisms (i.e., assemblage) which are found to inhabit a particular stream or river sampling location.

Biological Criteria: II

- Biological criteria are indexed to the reference assemblage of aquatic organisms within a particular geographical region (i.e., ecoregion) and with respect to stream and river size.

Establishing Reference Condition

I. Reference Sites

- Minimally to least impacted sites.
- Cultural setting & abiotic criteria – qualitative process used in 1980s.
- Subsets of sites needed for different ecotypes, water body types, and regions.
- Part of routine monitoring – *resampling over a 10 yr. time interval**).

* - a complete set of re-sampled reference data (1990-1999) is now available for Ohio.

Establishing Reference Condition

II. Reference Condition

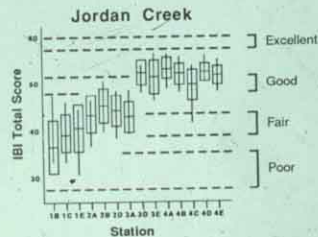
- Data collected at reference sites.
- A distribution of data, not a single fixed data point.
- Should include upper tiers of Biological Condition Gradient.
- Alternative approaches can be used when empirical data is lacking (historical archives, expert panels).
- Used first to *calibrate* metrics, then to *set biocriteria*.

Assessing Biological Integrity in Running Waters A Method and Its Rationale

James R. Karr
Kurt D. Fausch
Paul L. Angermeier
Philip R. Yant
Isaac J. Schlosser



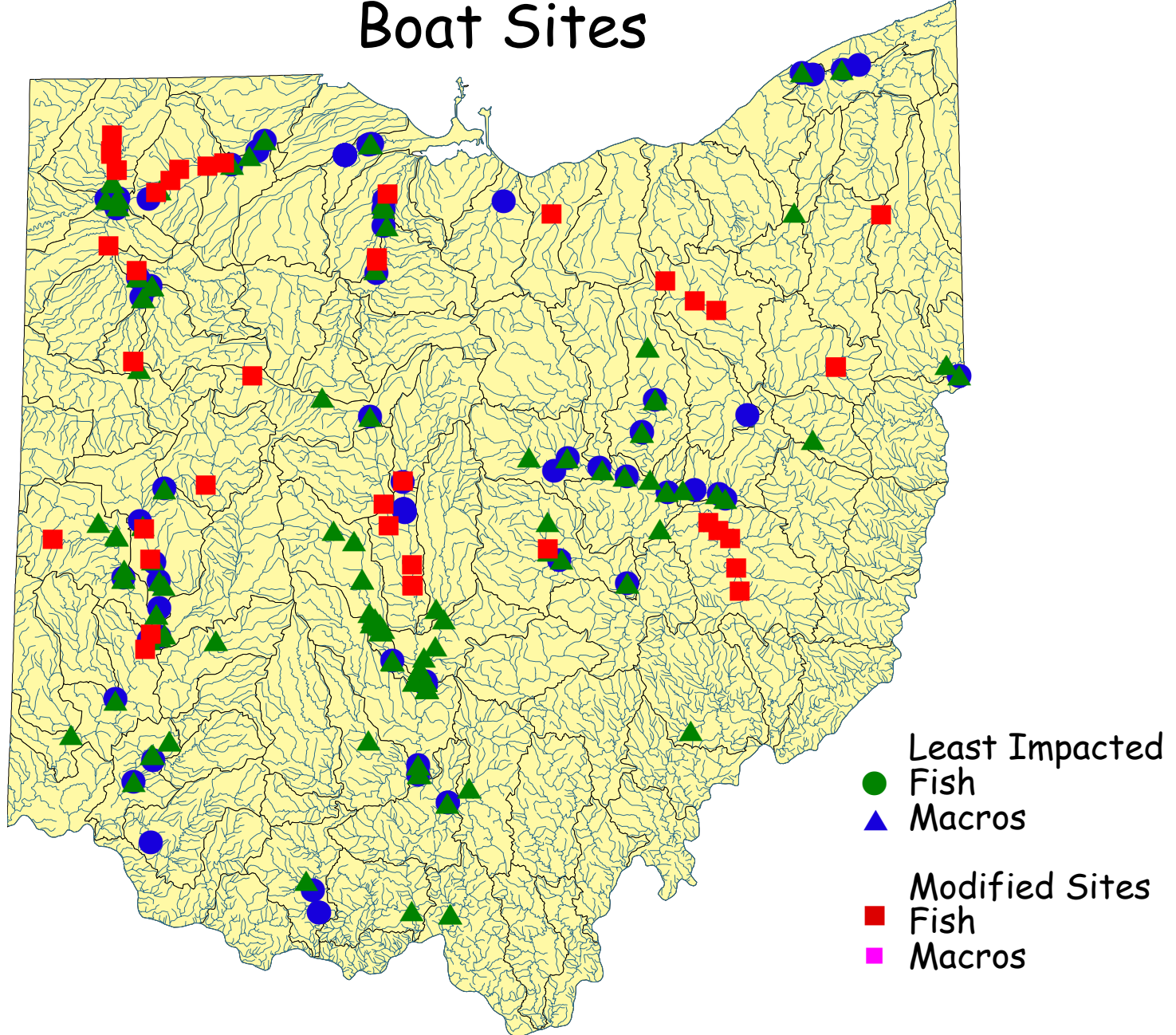
Illinois Natural History Survey
Special Publication 5 September 1986



Guidelines for Deriving Regionally Relevant “IBI Type” Assessment Tools

- Karr et al. (1986) provides guidance for metric development, substitution, and modification.
- Requires detailed knowledge of the regional fauna including life history, taxonomy, zoogeography, and natural history.
- Requires an extensive database from consistent sampling of both reference condition and a gradient of human disturbance.
- Requires extensive testing of candidate metrics and aggregate indices.

Ohio Biocriteria Reference Sites Boat Sites



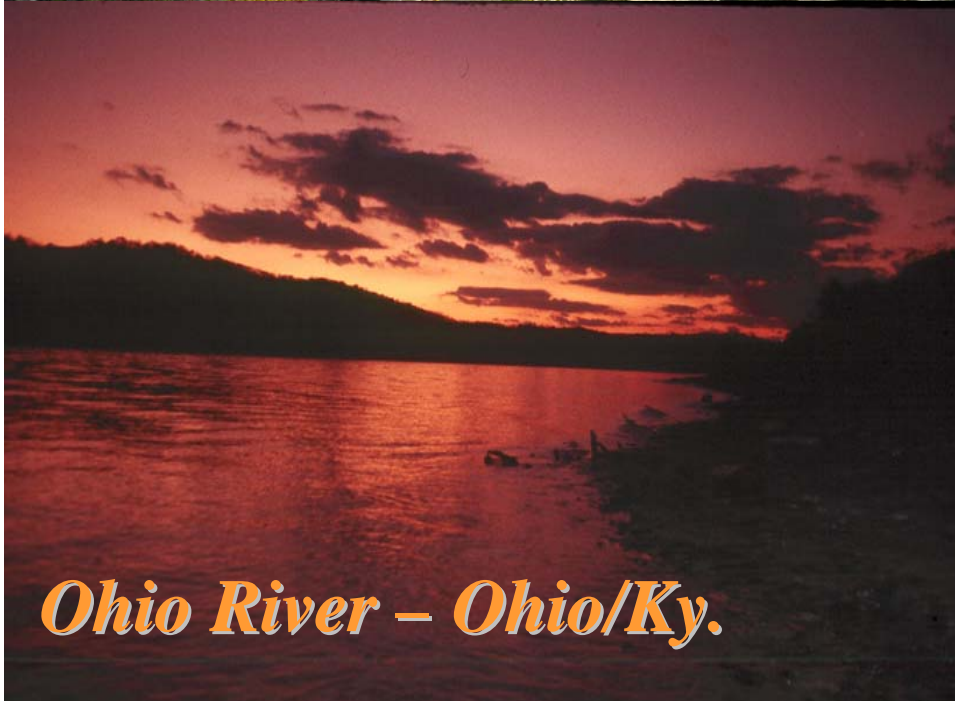
REFERENCE CONDITION



*Wisconsin –
N. Lakes/Forests*



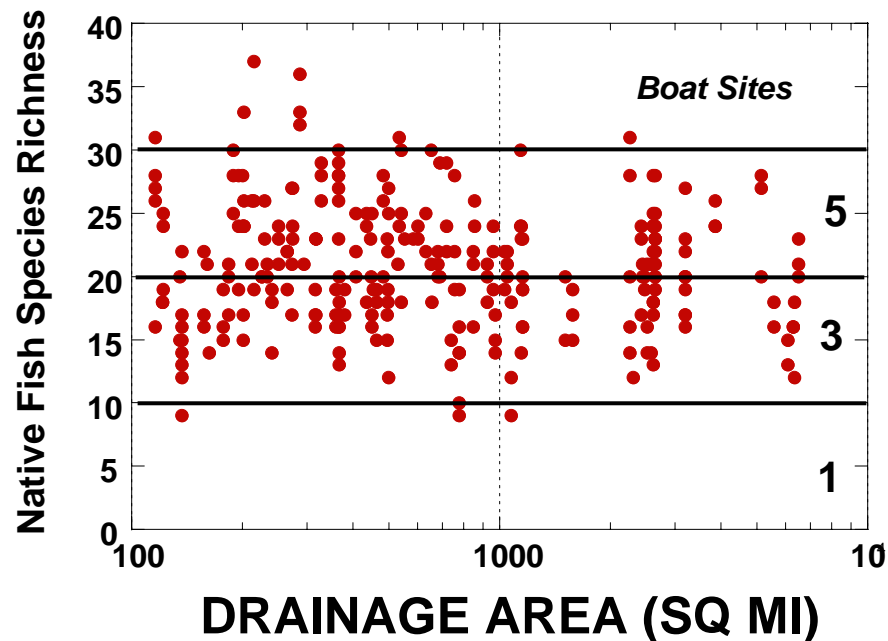
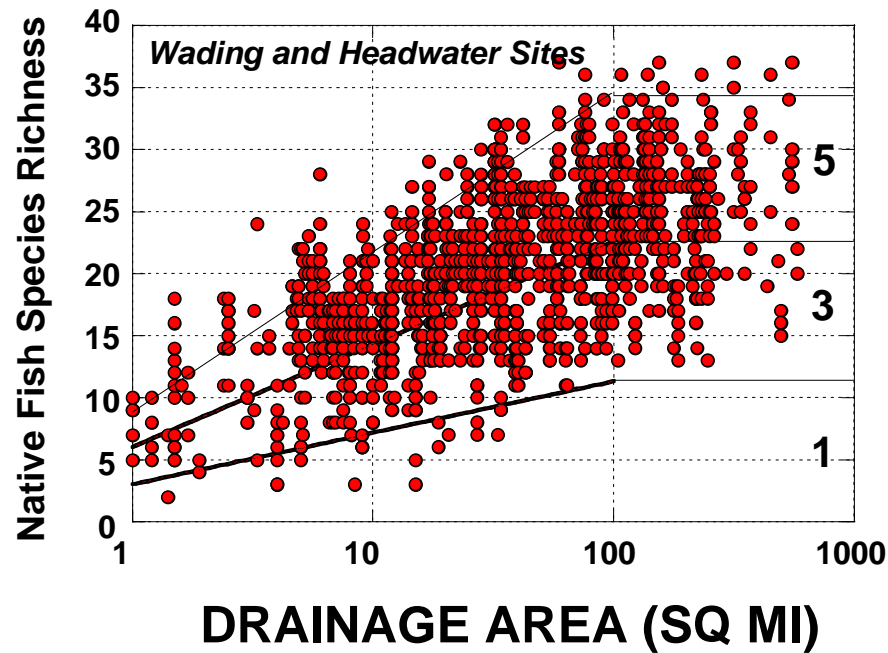
Ohio – Allegheny Plateau



Ohio River – Ohio/Ky.



*Ohio/Indiana/Illinois – E.
and Central Corn Belt*



Calibration of Metrics Using Regional Reference Sites

- Scatter plot of metric value by appropriate calibration vector (e.g., watershed area).
- Determine 95% maximum line of best fit across surface of scatterplot; *driven by best reference sites.*
- Area beneath 95% line is subdivided (e.g., trisection) to determine metric scores - most data points should occur in upper ranges.
- This method reduces the influence of slightly degraded sites that may not biologically reflect the intent of reference condition.
- Slope of 95% line conservatively assumed to be zero for boat sites.

Ohio Biological Criteria: Adopted May 1990 (OAC 3745-1-07; Table 7-14)

Huron Erie Lake Plain (HELP)

Use	Size	IBI	Mlwb	ICI
WWH	H	28	NA	34
	W	32	7.3	34
	B	34	8.6	34
MWH-C	H	20	NA	22
	W	22	5.6	22
	B	20	5.7	22
MWH-I	B	30	5.7	NA

Erie Ontario Lake Plain (EOLP)

Use	Size	IBI	Mlwb	ICI
WWH	H	40	NA	34
	W	38	7.9	34
	B	40	8.7	34
MWH-C	H	24	NA	22
	W	24	6.2	22
	B	24	5.8	22
MWH-I	B	30	6.6	NA

Eastern Corn Belt Plains (ECBP)

Use	Size	IBI	Mlwb	ICI
WWH	H	40	NA	36
	W	40	8.3	36
	B	42	8.5	36
MWH-C	H	24	NA	22
	W	24	6.2	22
	B	24	5.8	22
MWH-I	B	30	6.6	NA

Western Allegheny Plateau (WAP)

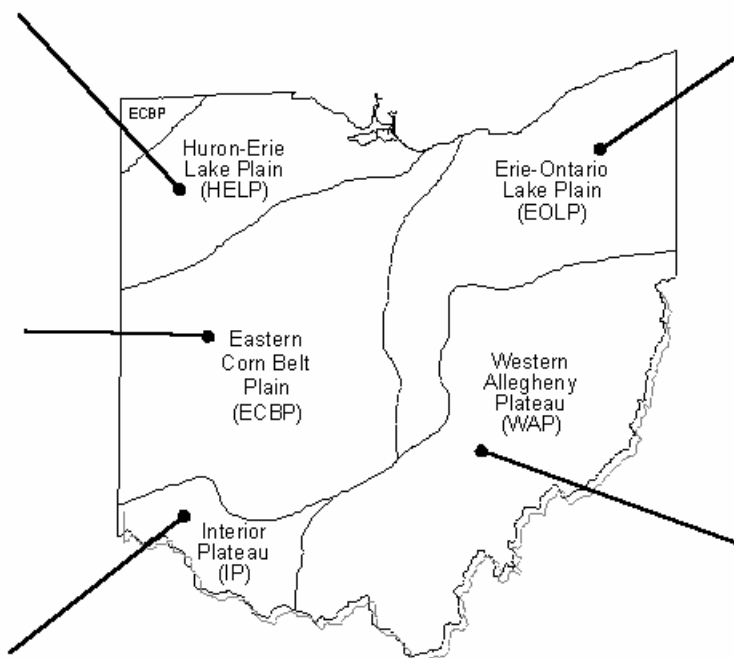
Use	Size	IBI	Mlwb	ICI
WWH	H	44	NA	34
	W	44	8.4	34
	B	40	8.6	34
MWH-C	H	24	NA	22
	W	24	6.2	22
	B	24	5.8	22
MWH-A	H	24	NA	30
	W	24	5.5	30
	B	24	5.5	30
MWH-I	B	30	6.6	NA

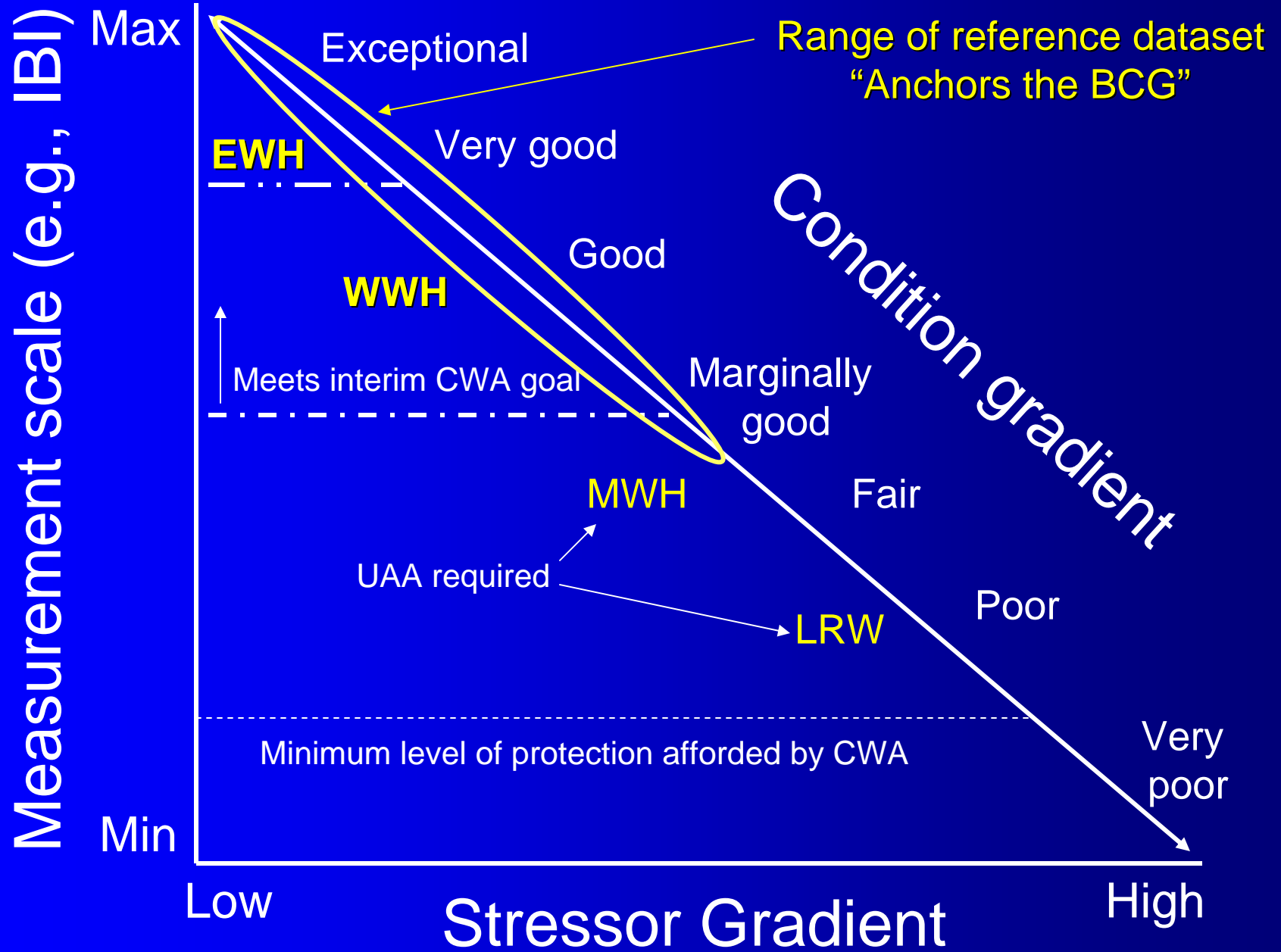
Interior Plateau (IP)

Use	Size	IBI	Mlwb	ICI
WWH	H	40	NA	30
	W	40	8.1	30
	B	38	8.7	30
MWH-C	H	24	NA	22
	W	24	6.2	22
	B	24	5.8	22
MWH-I	B	30	6.6	NA

Statewide Exceptional Criteria

Use	Size	IBI	Mlwb	ICI
EWB	H	50	NA	46
	W	50	9.4	46
	B	48	9.6	46

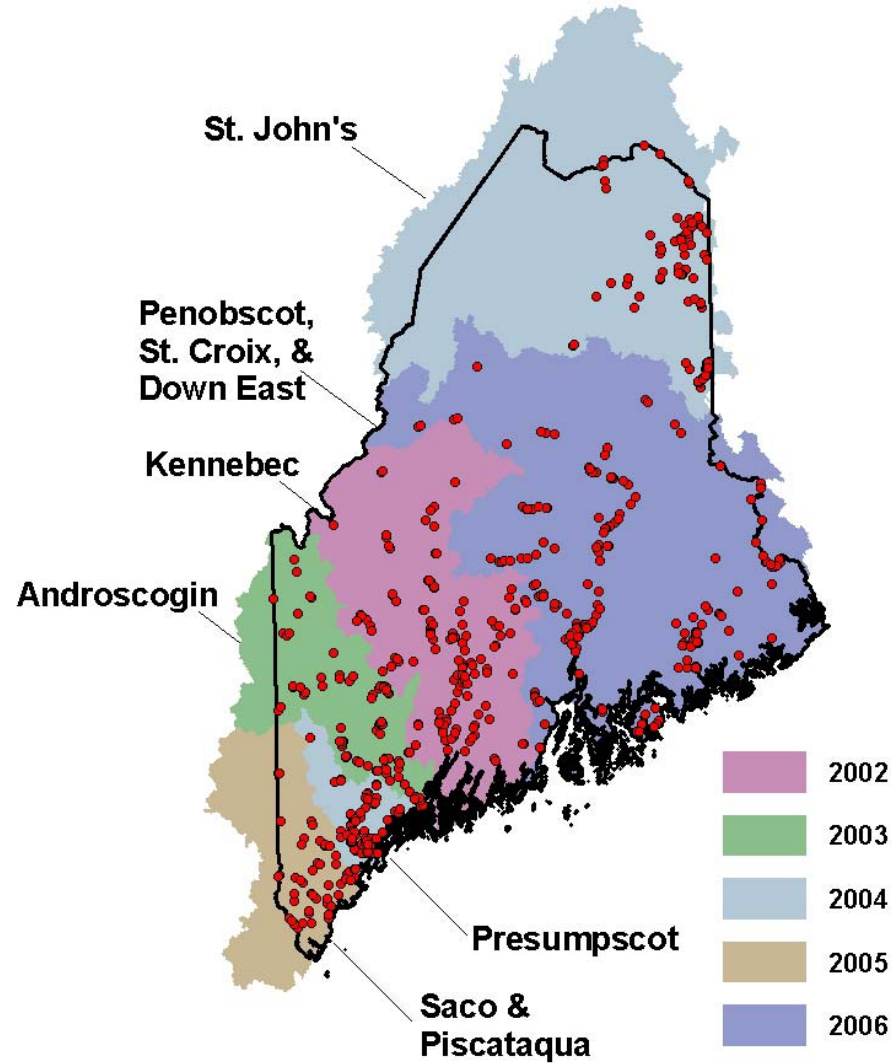




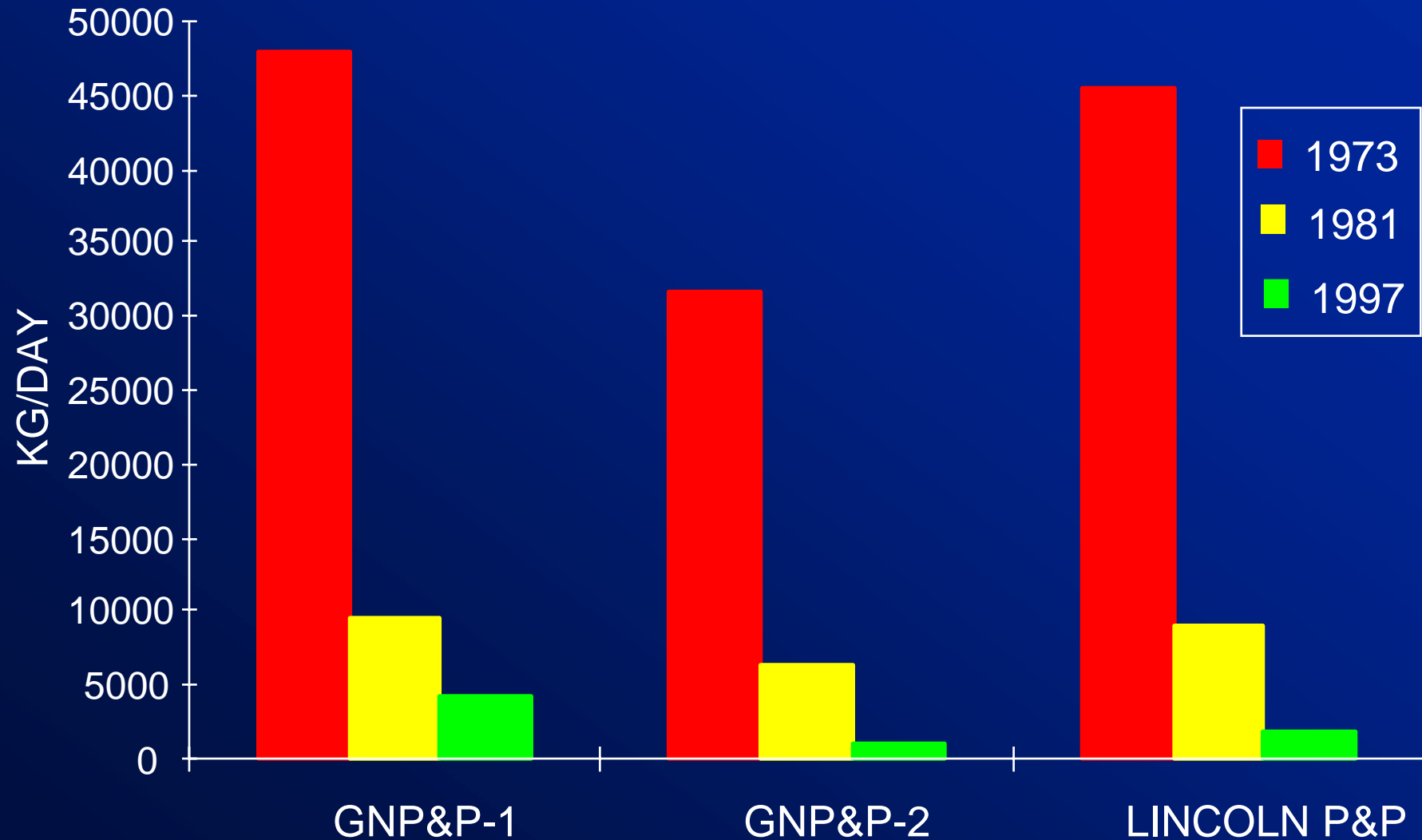
Biological Criteria: III

- Biological criteria represent a calibrated assessment tool which fosters an organized goal setting process in an effort to reconcile human impacts and guide restoration efforts.

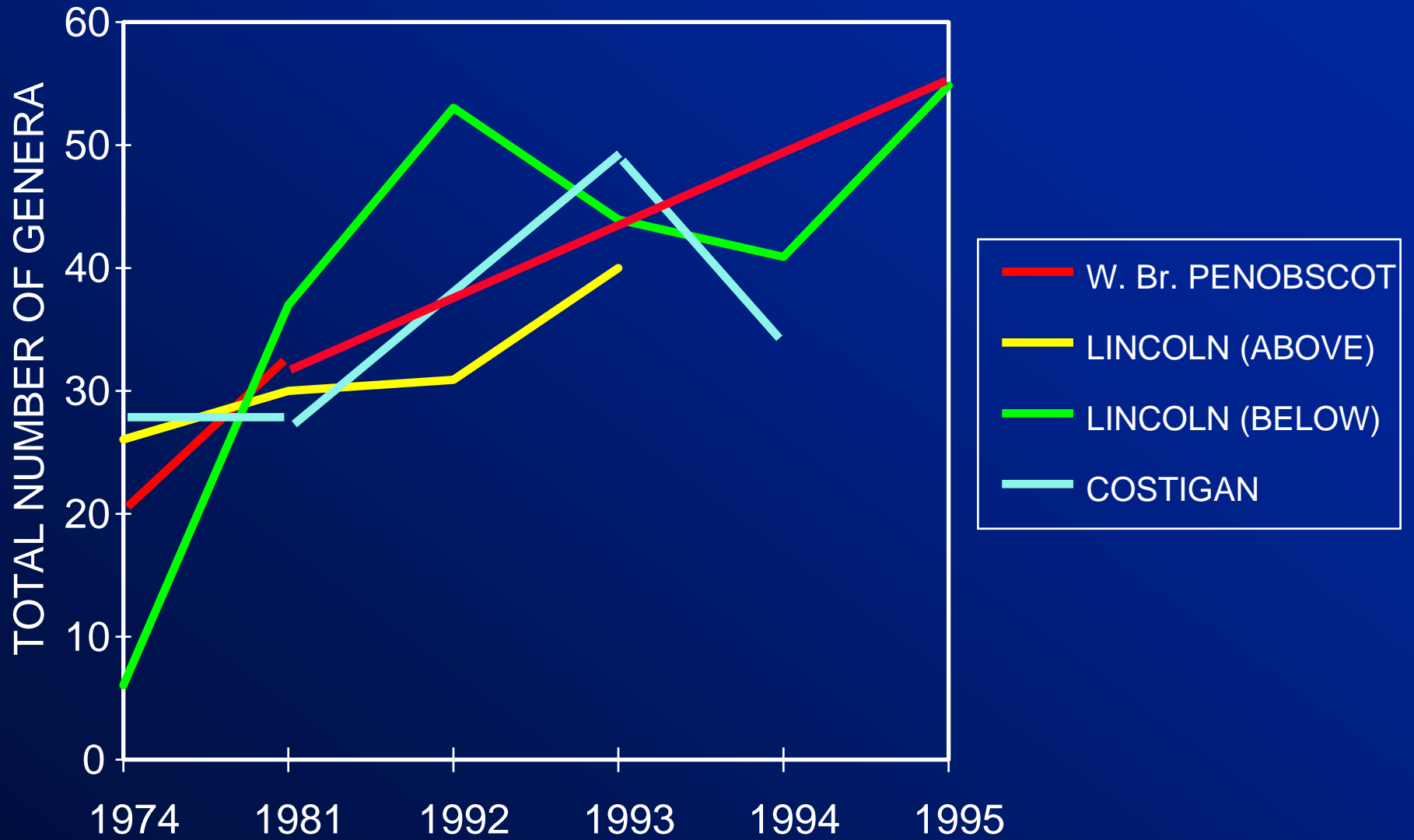
Maine DEP Bioassessments



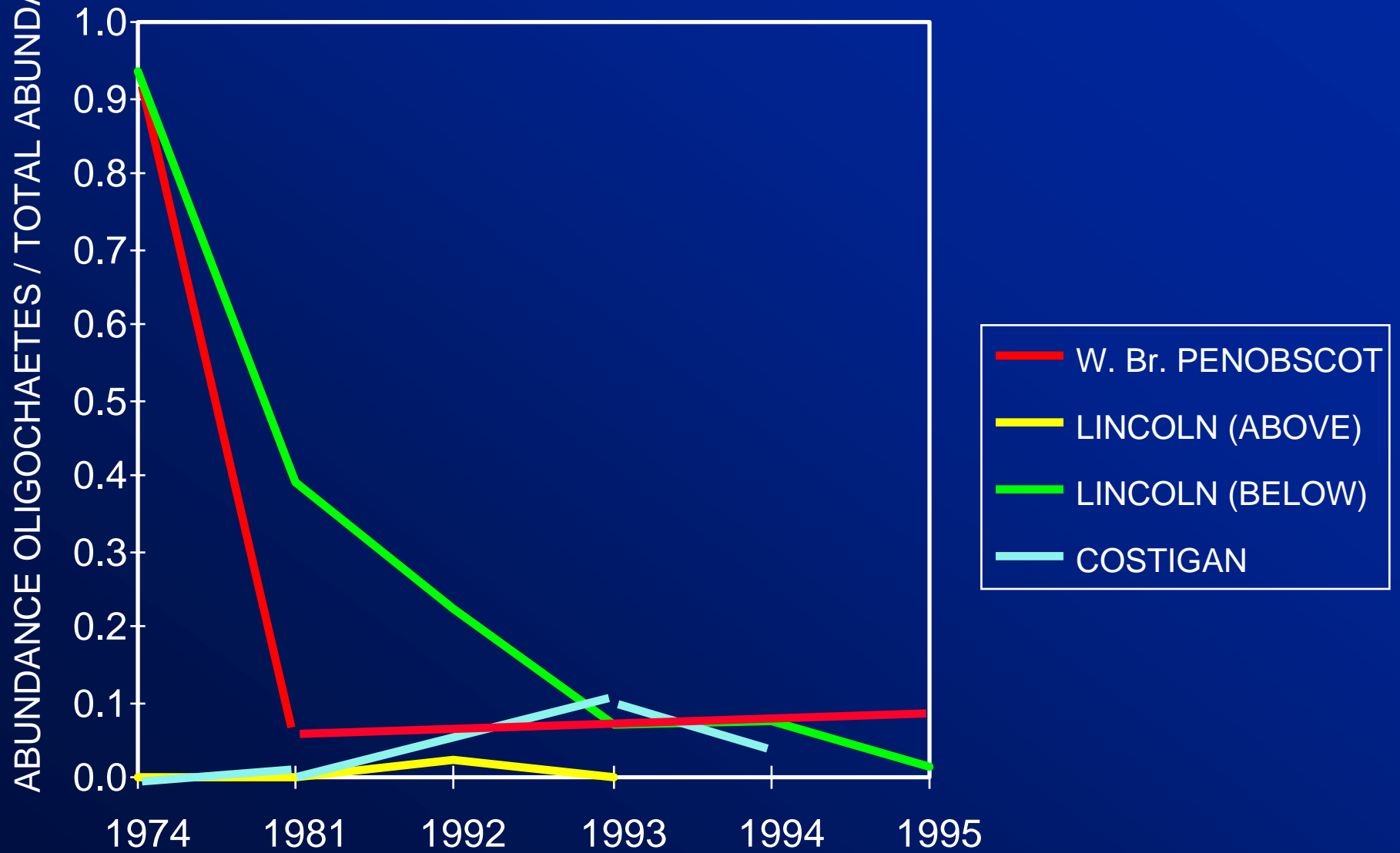
ESTIMATED TSS (KG/DAY) FOR THREE PULP AND PAPER MILLS ON THE PENOBSCOT RIVER



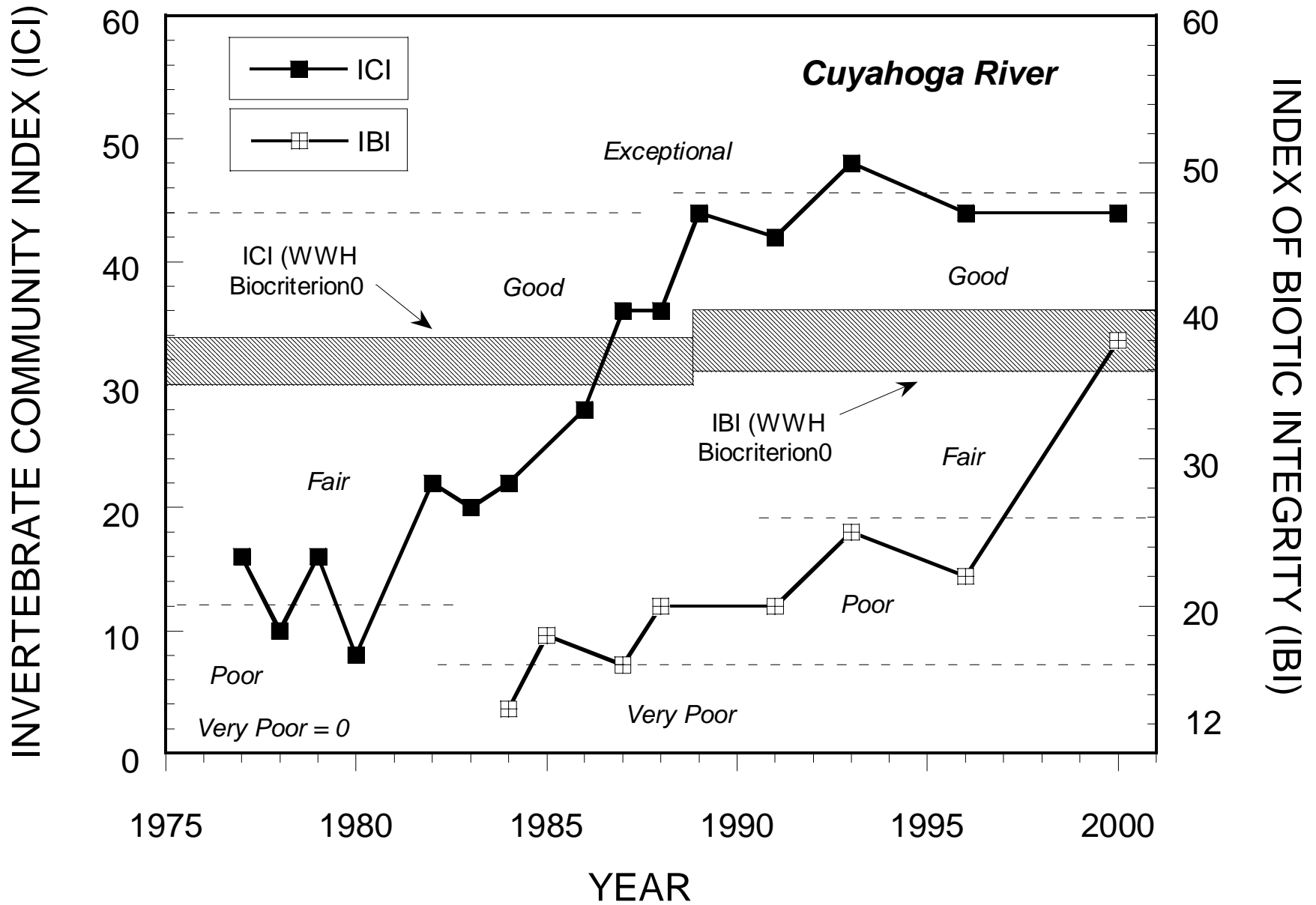
GENERIC RICHNESS

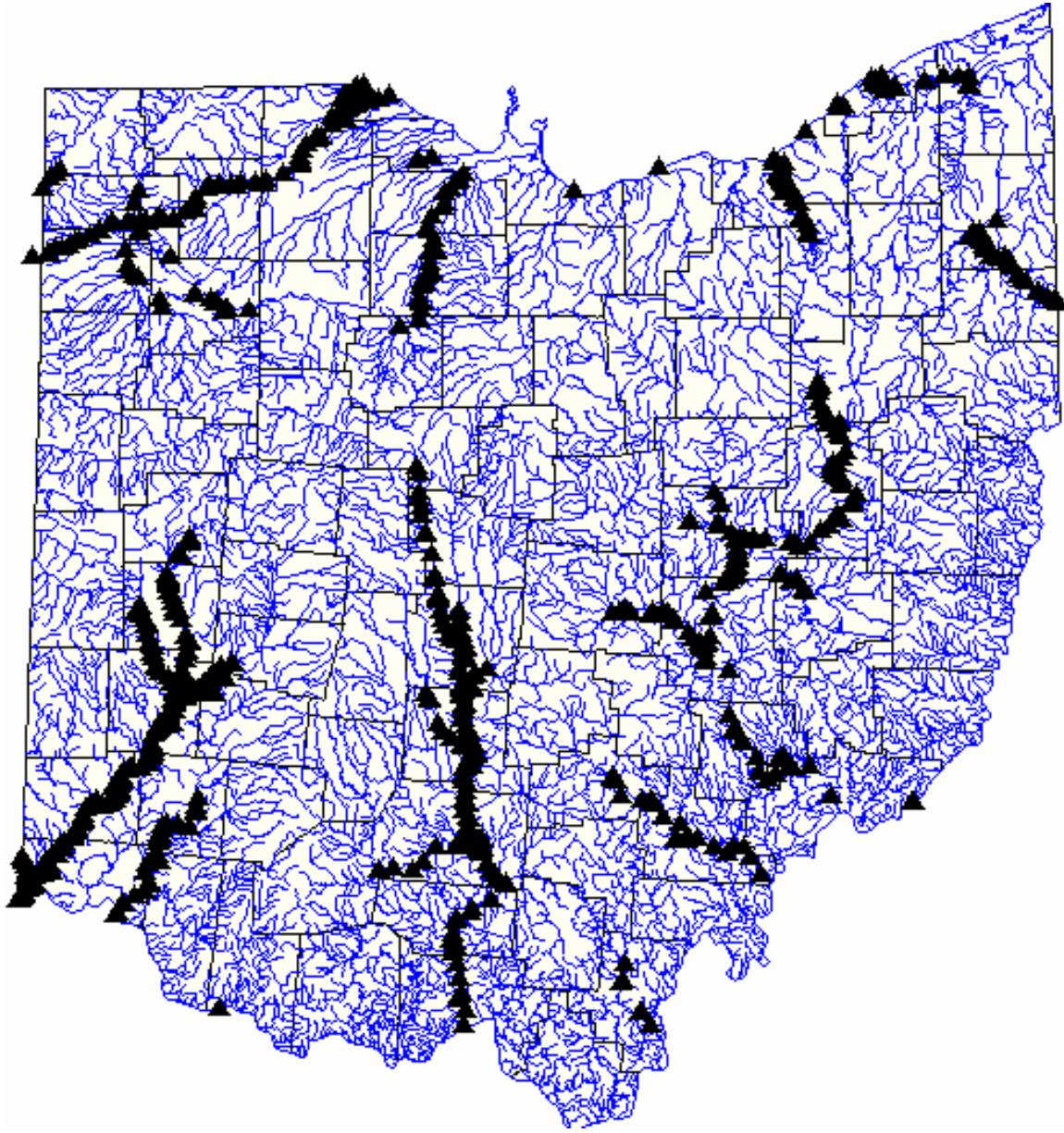


RELATIVE ABUNDANCE OLIGOCHAETA




Hillside Road (RM 15.6) Fish and Macroinvertebrate Trends





Ohio Large Rivers Bioassessment: 1979 - present

- Multiple stressors (point & nonpoint sources, habitat, hydromodification)
- Intensive survey design
- Repeat samplings >1 to 5-10 years; supports before & after assessments
- Aggregate assessment for waterbody subclass (>150-500 mi.²)



***Mission Accomplished?
Declarations of “total victory”
– are they premature?***

Domestic Wastewater

Industrial Wastewater

***Many large rivers are effluent
dominated by treated sewage
flows – growth pressures are
taxing existing infrastructure
and assimilative capacity***

***Multiple, Interactive
Sources***

Acute/Chronic Effects

NONPOINT SOURCES

A photograph showing a steep, exposed soil bank with deep vertical erosion channels, indicating significant soil loss.

Severe Bank Erosion

A photograph of a stream with dark, turbid water and a shoreline littered with plastic bottles, cans, and other debris, illustrating urban stormwater runoff.

Urban Stormwater

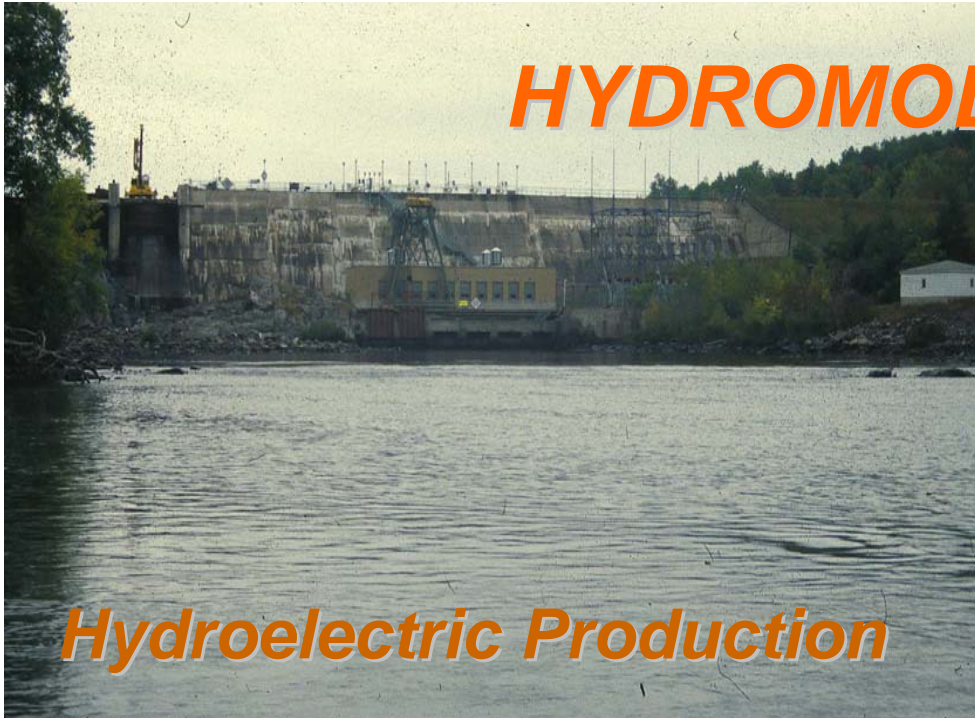
An aerial photograph showing a river winding through a landscape where agricultural fields and roads have encroached upon the riparian zone.

Riparian Encroachment

A photograph of a stream bed covered in a thick layer of brown silt and sediment, with a large rock partially submerged and a log floating nearby.

Siltation of Substrates

HYDROMODIFICATION



Hydroelectric Production



Flow Fluctuations



Flow Starvation



Low-head Dams

Changes in Fish Assemblage Status in Ohio's Nonwadeable Rivers and Streams over Two Decades

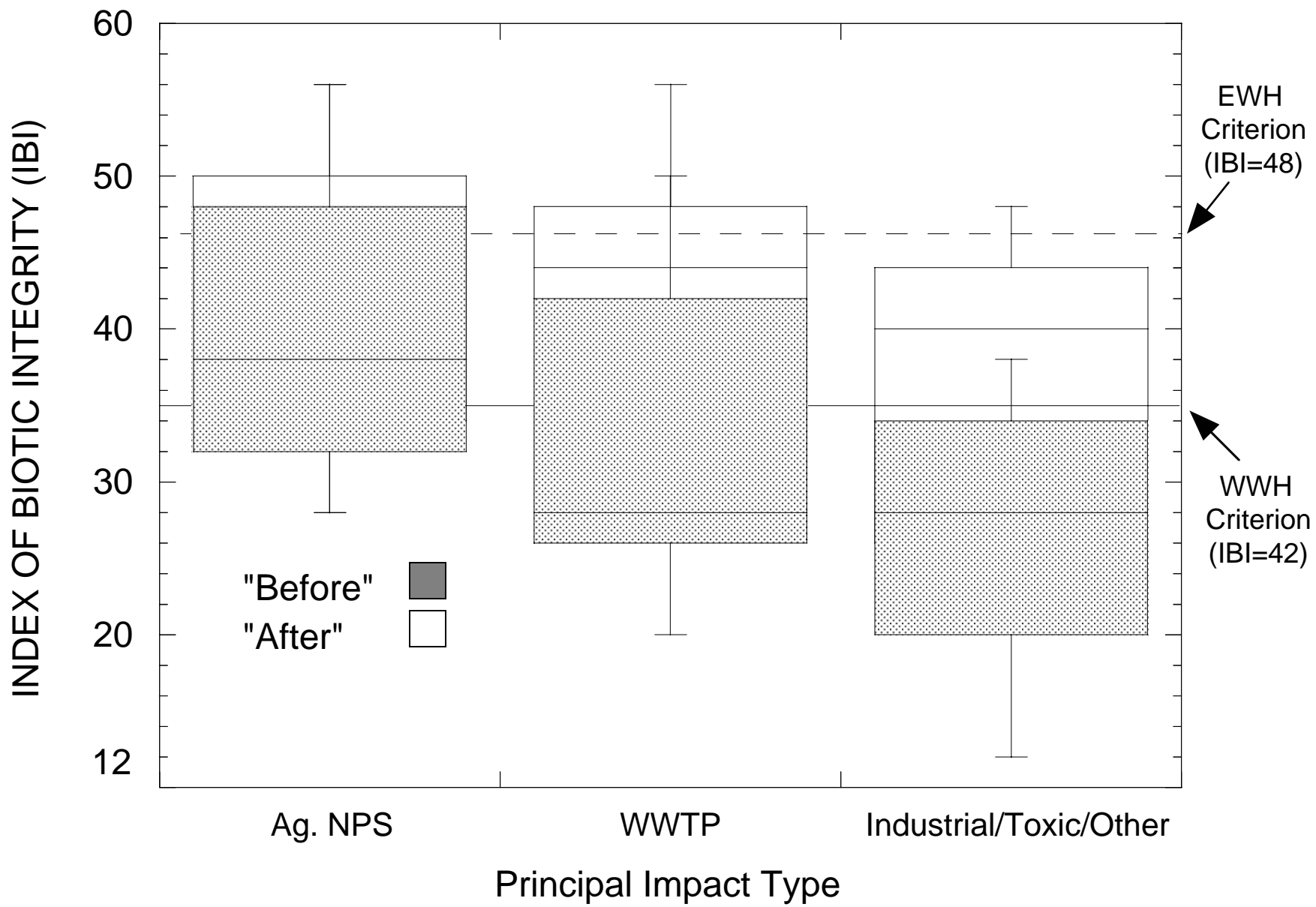
CHRIS O. YODER¹ AND EDWARD T. RANKIN

*Midwest Biodiversity Institute and Center for Applied Bioassessment and Biocriteria
Post Office Box 21561, Columbus, Ohio 43221–0561, USA*

MARC A. SMITH, BRIAN C. ALSDORF, DAVID J. ALTFATER, CHARLES E. BOUCHER,
ROBERT J. MILTNER, DENNIS E. MISHNE, RANDALL E. SANDERS, AND
ROGER F. THOMA

Ohio Environmental Protection Agency, 4675 Homer Ohio Lane, Groveport, Ohio 43125, USA

Abstract.—A systematic, standardized approach to monitor fish assemblages has been applied in Ohio's rivers since 1979. A primary objective is the assessment of changes in response to water pollution abatement and other water quality management programs. All major, nonwadeable rivers were intensively sampled using standardized electrofishing methods and a summer–early fall index period. Most rivers were sampled two or three times, before and after implementation of pollution controls at major point source discharges and best management practices for nonpoint sources. A modified and calibrated index of biotic integrity (IBI) was used to demonstrate and evaluate changes at multiple



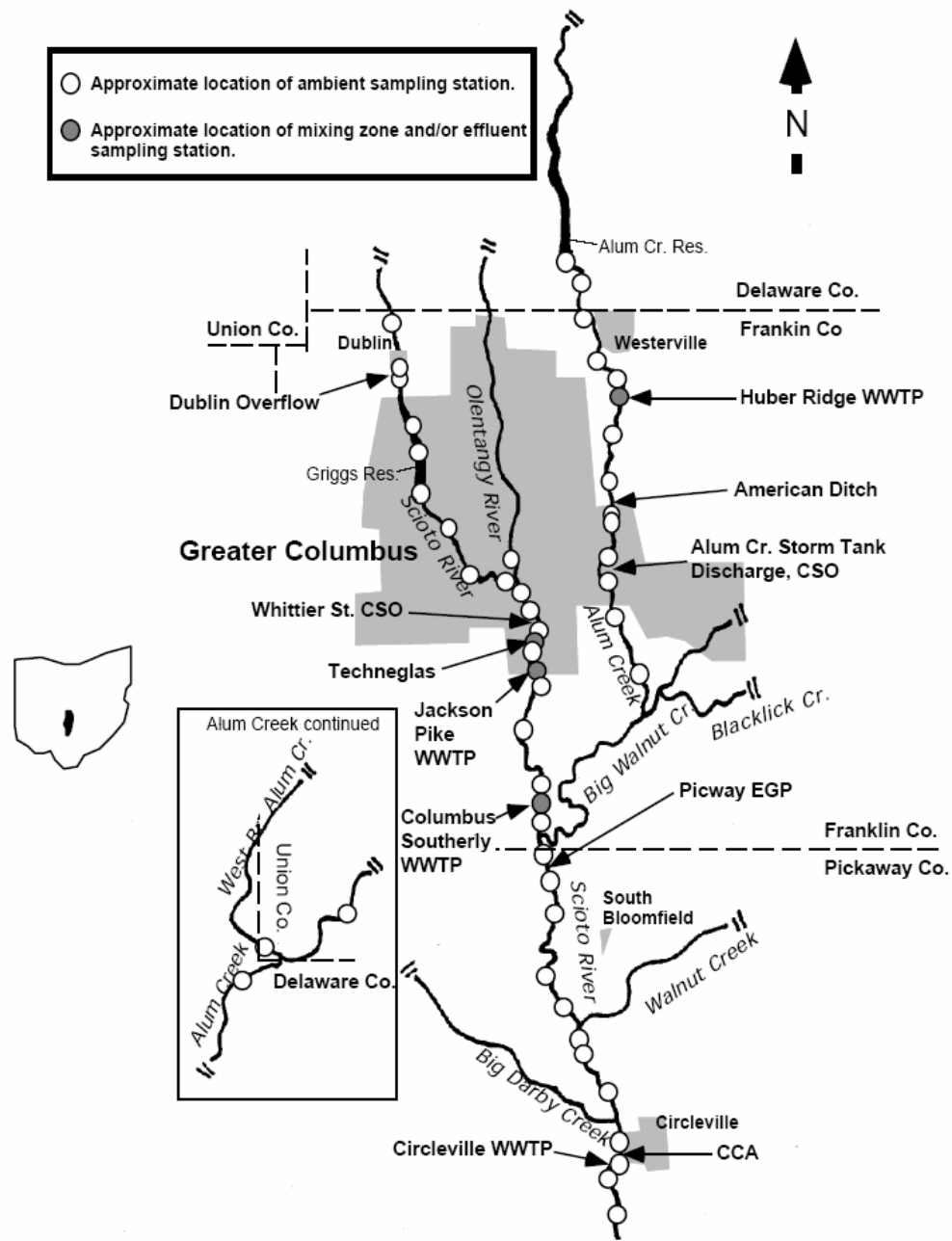


Figure 4.. The 1996 middle Scioto River study area showing principal streams and tributaries, population centers, major pollution sources and environmental monitoring stations.

Application of Biocriteria in Complex Settings

1. Free-flowing river (WWH use designation):

Upstream from urban area ECBP Ecoregion - Wading site type:

IBI = 40

MIwb = 8.3

ICI = 36



Limiting Factors:

- chemical water quality
- physical habitat
- flow/energy dynamics

2. Impounded river (MWH use designation):

Within urban area ECBP Ecoregion - Boat site type:

IBI = 30

MIwb = 6.6

ICI = N/A



CSOs

Limiting Factors:

- physical habitat
- energy/flow dynamics
- chemical water quality

3. Free-flowing river (WWH use designation):

Downstream from urban area ECBP Ecoregion - Boat site type:

ECBP Ecoregion - Boat site type:

IBI = 42

MIwb = 8.5

ICI = 36

WWTP

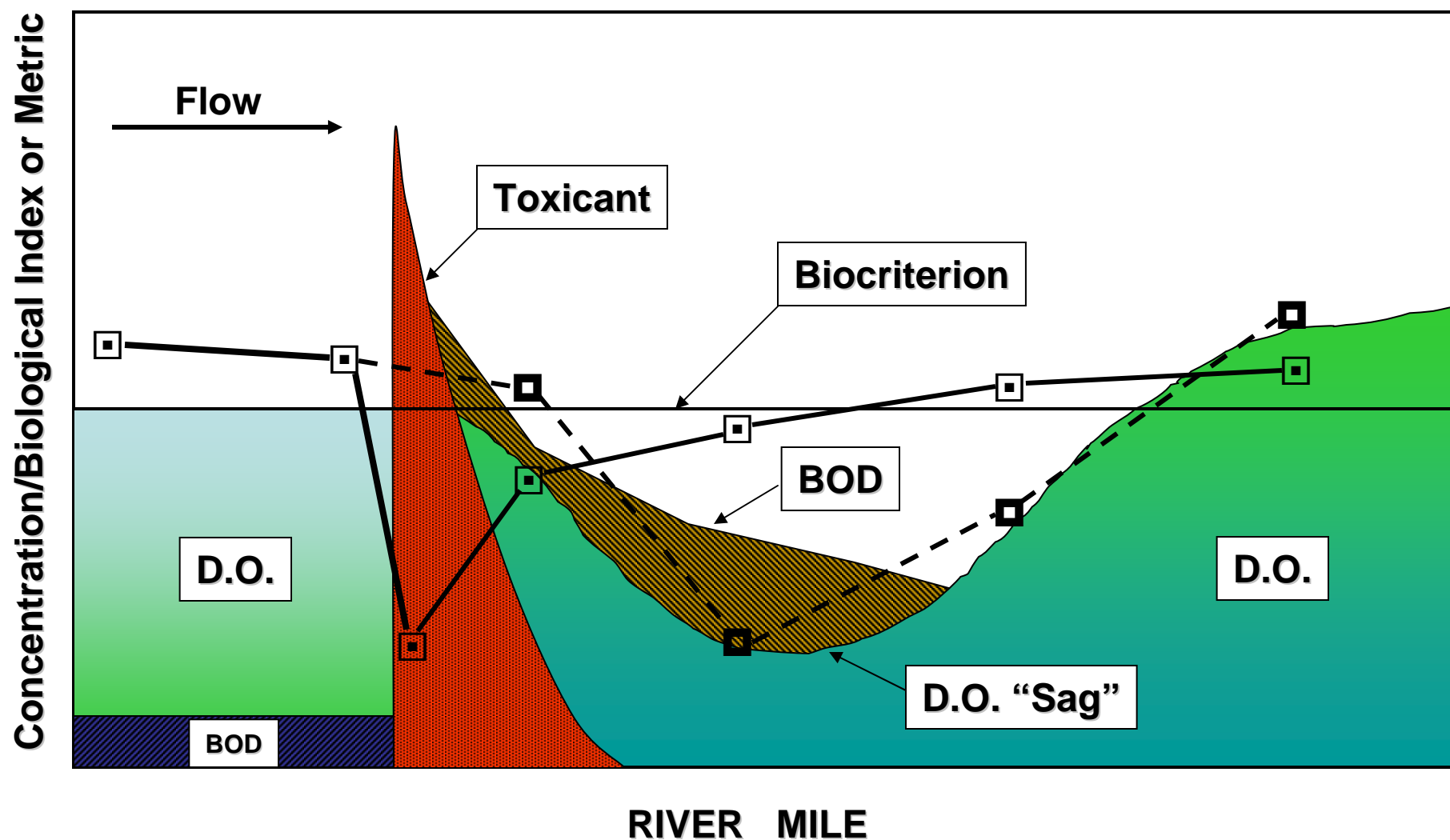


Limiting Factors:

- chemical water quality
- energy/flow dynamics
- physical habitat

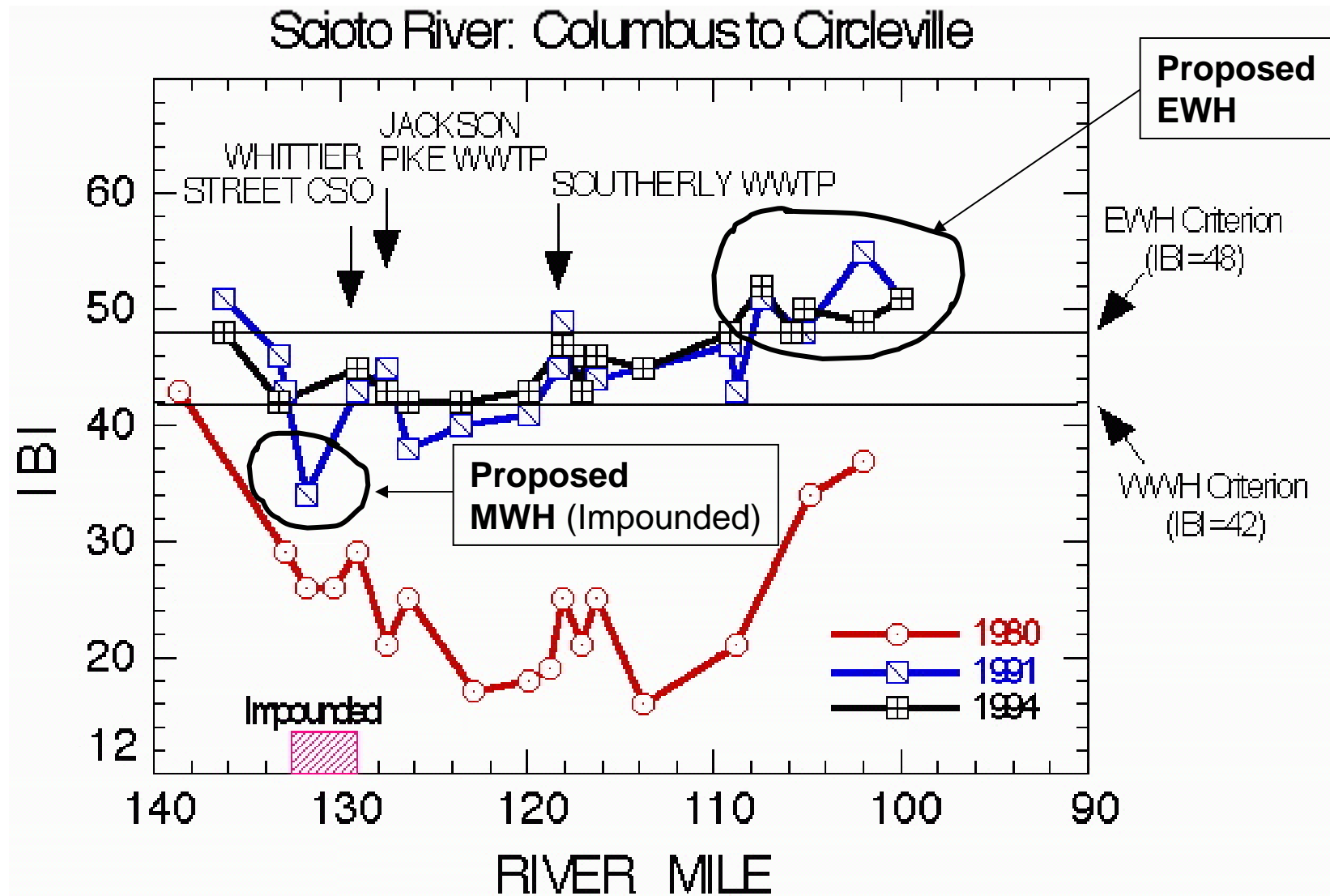
Flow Direction →

Resurrecting the Concept of the Pollution Impact Continuum in Rivers: It Still Exists

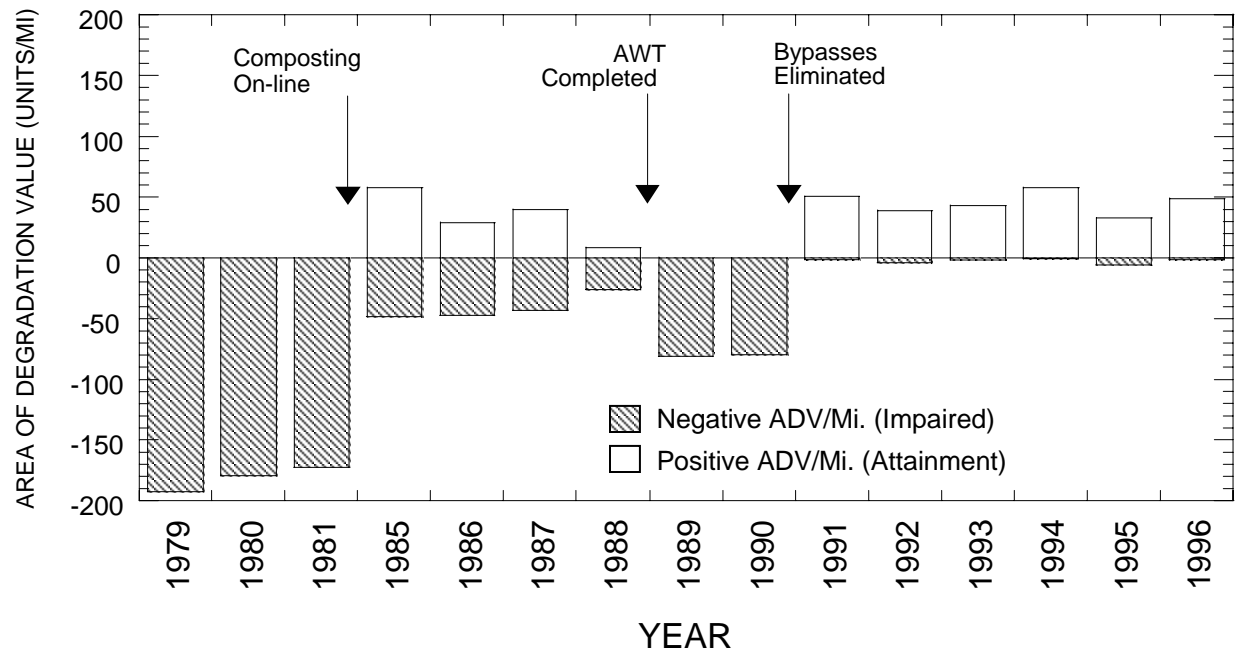
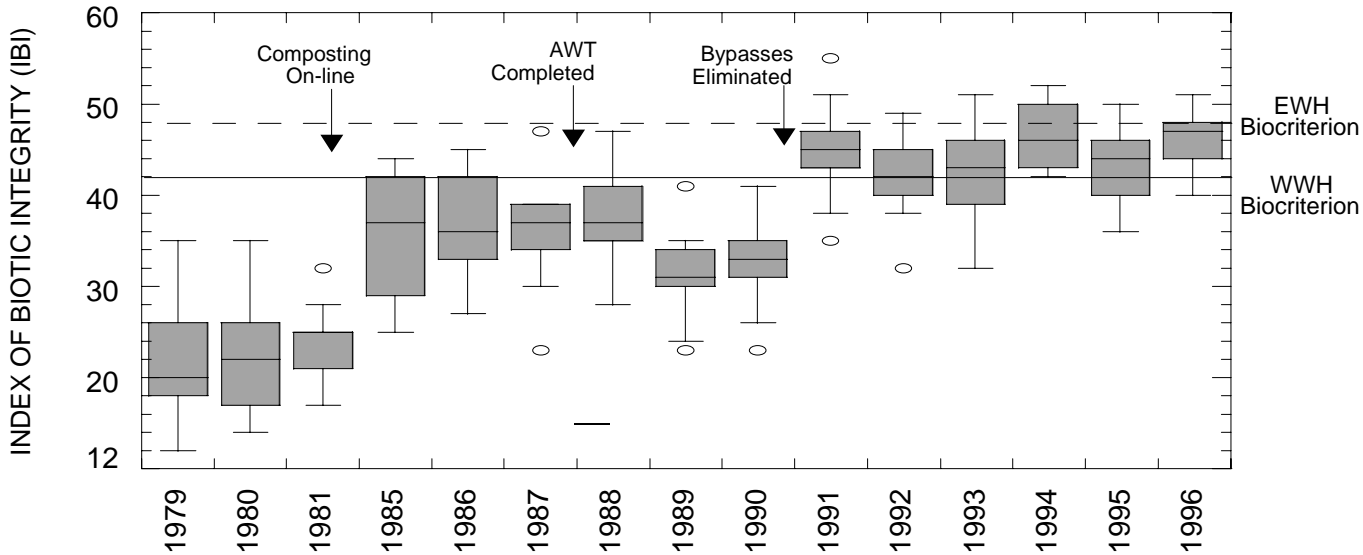


After Bartsch and Ingram (1967)

Demonstrating Changes Through Time: Scioto River 1980 - 1994

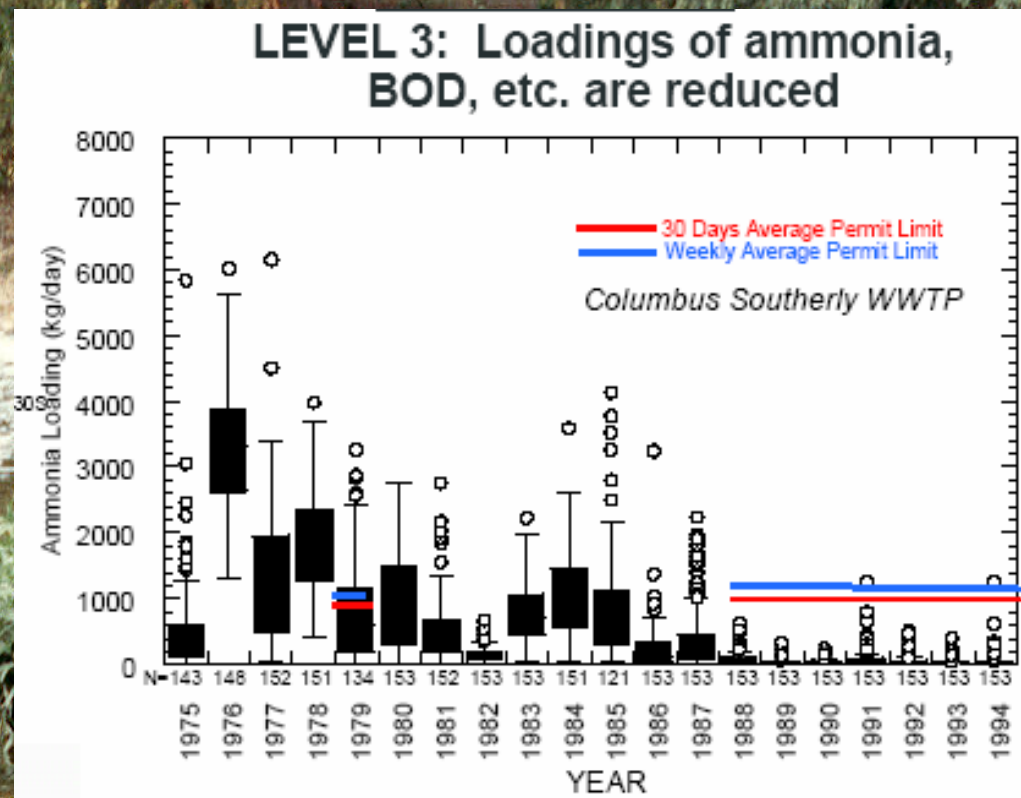


Demonstrating Changes Through Time: Scioto River (1979 – 1996)



YEAR

Jackson Pike WWTP – 75 MGD
Columbus Southerly WWTP – 125 MGD
Combined 200 MGD = 90-95% of summer base flow



Measuring and Managing Environmental Progress: Hierarchy of Indicators

1. Management actions

2. Response to management

3. Stressor abatement

4. Ambient conditions

5. Direct exposure to effects of pollution

6. Biological response

Administrative indicators

[permits, plans, grants, enforcement, [technologies used, BMPs installed]

Stressor indicators

[effluent reduction, changes in land-use practices]

Exposure indicators

[pollutant conc., flow or physical habitat alteration, assimilation and uptake of pollutants, reduced spawning habitat, nutrient dynamics changes, sedimentation effects, etc.]

Response indicators

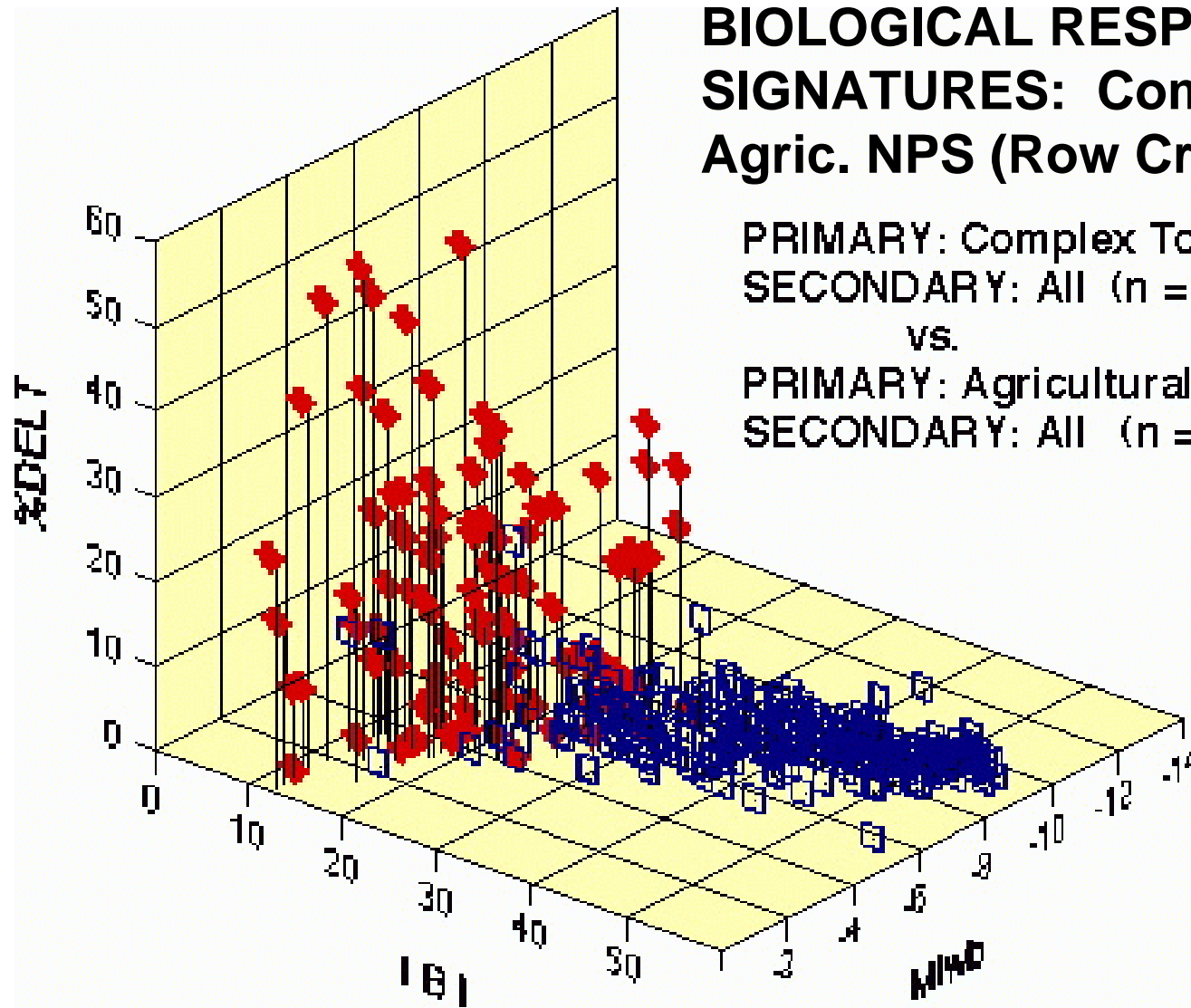
[biological metrics, multimetric indexes, target species, other biological measures]

Endpoint of Concern: "ecological health"

BIOLOGICAL RESPONSE SIGNATURES: Complex Toxic vs. Agric. NPS (Row Crop)

PRIMARY: Complex Toxic
SECONDARY: All (n = 106)
vs.

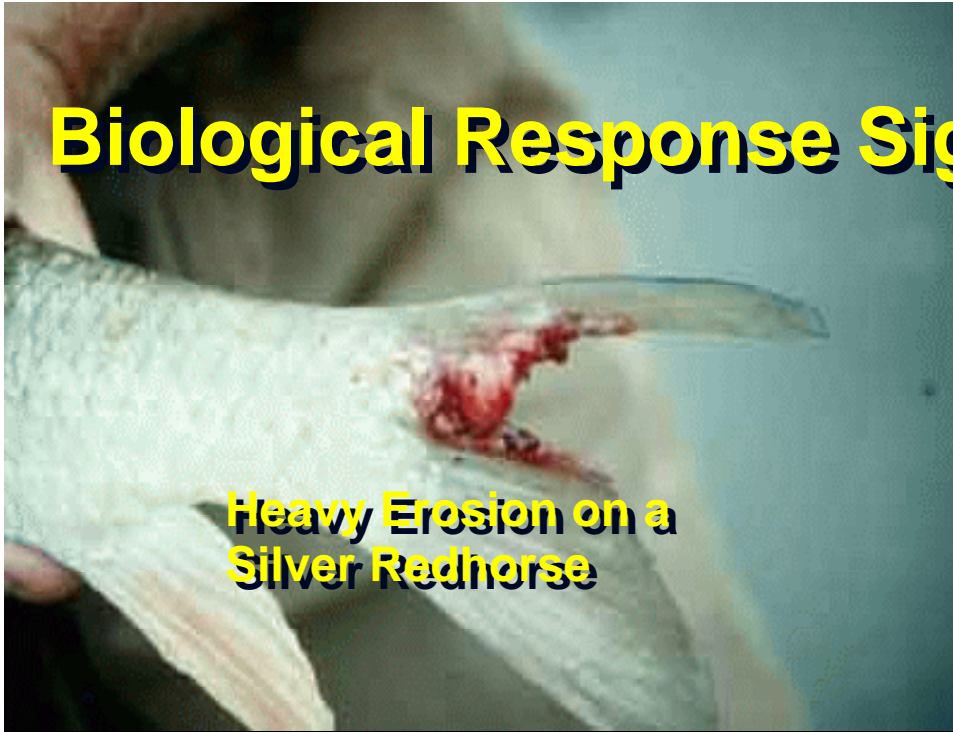
PRIMARY: Agricultural NPS
SECONDARY: All (n = 381)



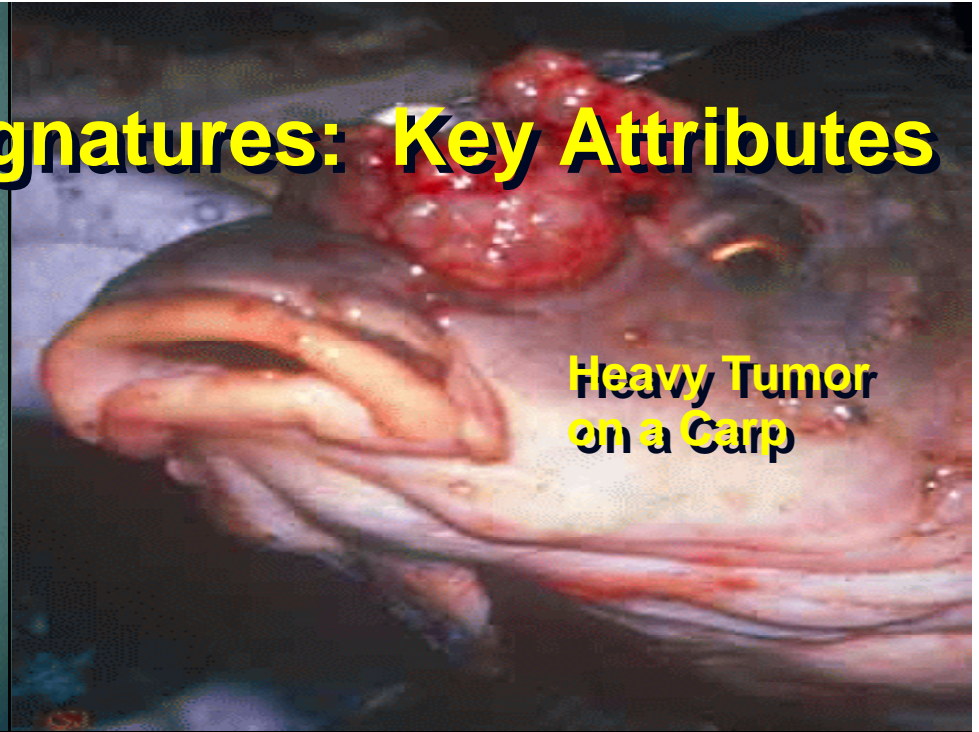
HELP/ECBP Ecoregions

after Yoder and Rankin (1995)

Biological Response Signatures: Key Attributes



Heavy Erosion on a Silver Redhorse

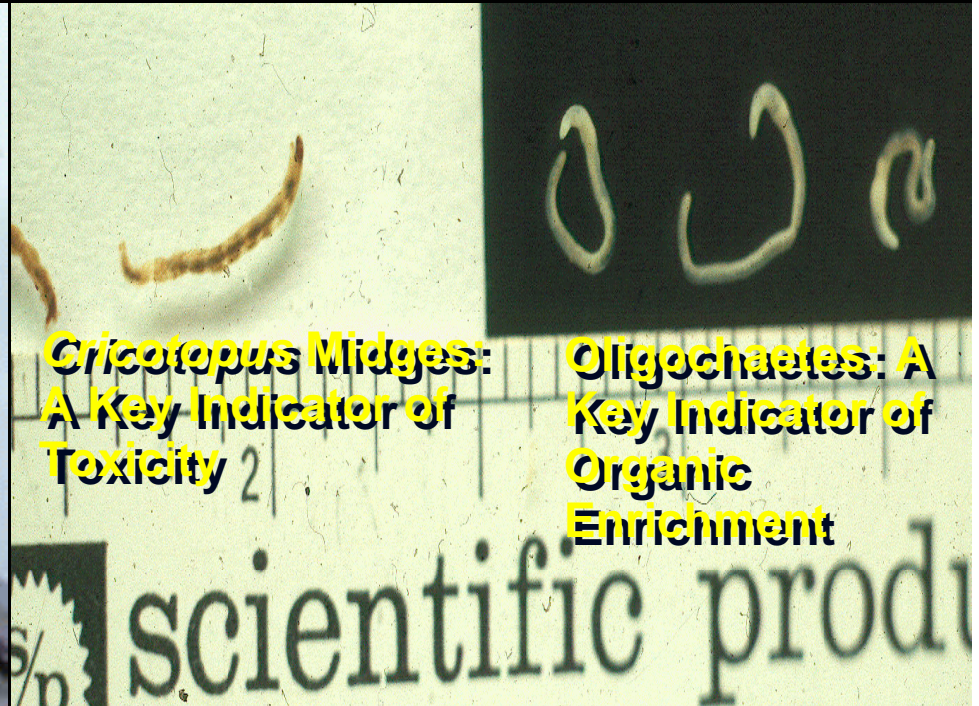


Heavy Tumor on a Carp



Heavily Eroded Barbels & Deformities on a Yellow Bullhead

Normal Barbels on a Yellow Bullhead

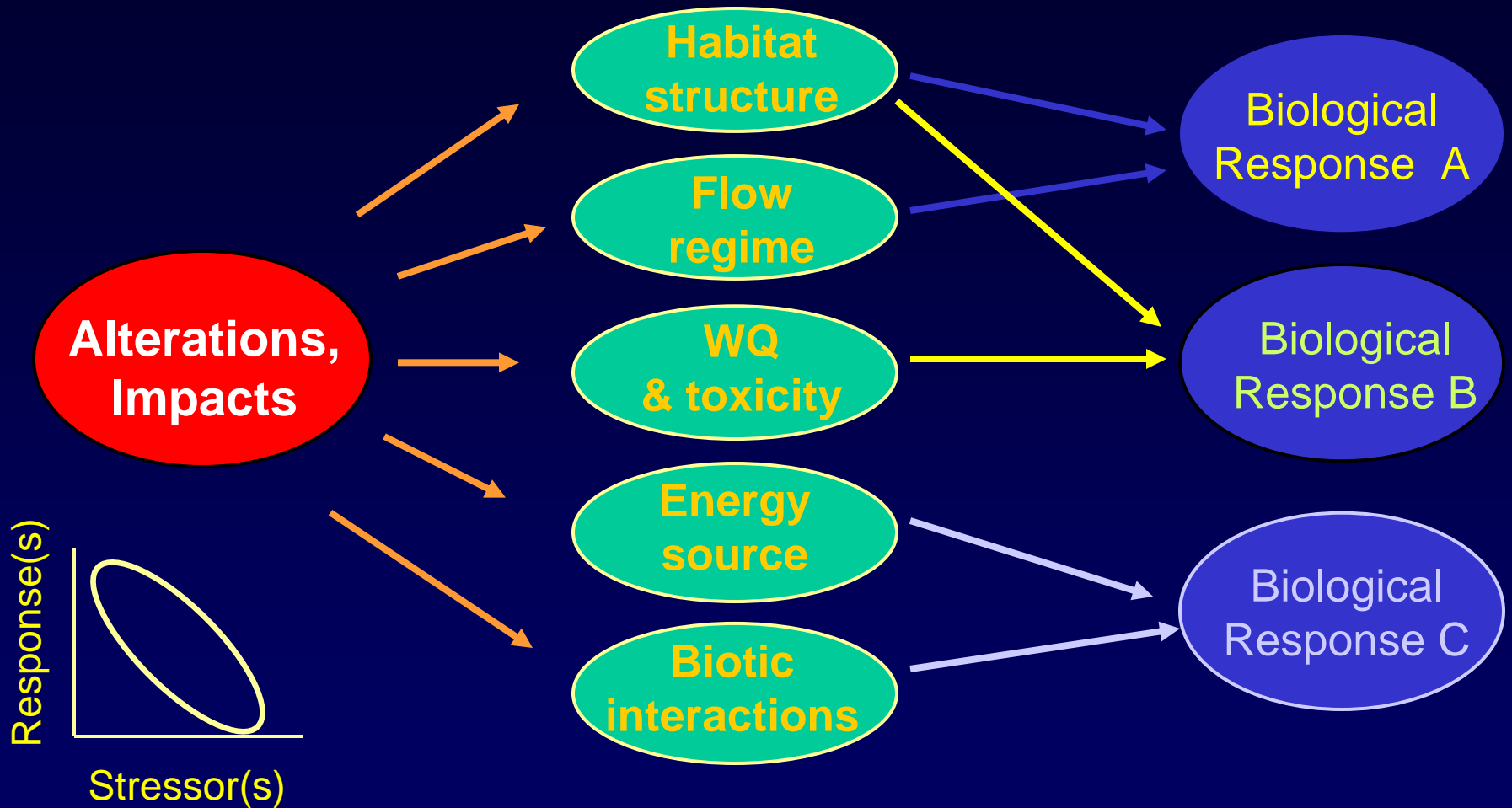


Cricotopus Midges: A Key Indicator of Toxicity

Oligochaetes: A Key Indicator of Organic Enrichment

scientific products

Linking Biological Responses to Stressors



Human activity:
“the drivers”

**Altered water
resource features**
“stress & exposure”

**Biological
endpoint**

Good quality biological data *and a process for using it* is essential for improving the management of aquatic resources and bringing policy and legislation into the 21st Century