

PROTECTED RESOURCES PROGRAM
and the
NATIONAL MARINE SANCTUARY PROGRAM

Strategic Planning Workshop Final Report

Working Together to Conserve and Recover
Protected Resources in National Marine Sanctuaries

December 6-8, 2004
NOAA Fisheries Southwest Regional Office
Long Beach, California



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U.S. Department of Commerce
National Oceanic and Atmospheric Administration
National Marine Fisheries Service

NOAA Technical Memorandum NMFS-OPR-30
January 2006

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U.S. Department of Commerce
Carlos M. Gutierrez, Secretary

National Oceanic and Atmospheric Administration
Vice Admiral Conrad C. Lautenbacher, Jr., USN (Ret.)
Under Secretary for Oceans and Atmosphere

National Marine Fisheries Service
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Executive Summary

Working Together to Conserve and Recover Protected Resources in National Marine Sanctuaries

The National Ocean Service (NOS) National Marine Sanctuary Program (NMSP) and the National Marine Fisheries Service (NMFS) Protected Resources Program (PRP) share Federal stewardship responsibilities for many of the same resources. While the PRP has responsibility for protected species throughout their entire range, the NMSP has similar responsibilities for those resources and habitats that occur within sanctuaries' boundaries. The two programs have taken a significant strategic step forward towards improved coordination of conservation and recovery of protected species. The goal of the planning workshop was to increase the collaboration between the two NOAA programs by identifying and formalizing joint activities that build upon existing capabilities and improve the implementation of conservation and recovery plans for protected resources within sanctuaries' waters.

On December 6-8, 2004, staff from both programs met at the NMFS Southwest Regional Office in Long Beach, California to outline the steps necessary to move forward with collaborative projects between NOAA line offices. The goals of the workshop included mutual learning about each other's programs and staffs and identifying and formalizing joint activities that forward shared capabilities. In recent years, several internal and external reports looking at the science and management processes used by NOAA have reported an imbalance between the resources needed to meet legislative mandates and stakeholder expectations, and the resources available to NOAA. Although the workshop identified a need for some additional resources, its primary output was a set of projects that incorporate coordinated activities that improve management and decision making through increased efficiency and improved cooperative science and management.

Progress towards the National Oceanic and Atmospheric Administration's (NOAA) mission goals will be improved with the execution of collaborative, geographically-based conservation and recovery of protected resources in national marine sanctuaries. The two programs support the NOAA mission goal to protect, restore and manage the use of coastal and marine resources through Ecosystem Approaches to Management (EAM). An EAM is an approach that is:

“geographically specified, adaptive, takes account of ecosystem knowledge and uncertainties, considers multiple external influences, and strives to balance diverse societal objectives.

Implementation will need to be incremental and collaborative.”

These two programs have taken significant steps towards improved cooperative conservation and EAM by completing a comprehensive assessment of shared capabilities and existing partnerships, specifically looking for mutual regional priorities and targets for integration.

Improving coordination and partnering between the two programs to achieve species recovery would enhance protected species populations and their ecosystems. Progress can be gained by the development of regulations and permitting activities that affect marine protected resources in sanctuaries; by facilitating a more coordinated program to assess, characterize and monitor protected resources in sanctuaries; improving the development and implementation of conservation and recovery strategies within sanctuaries' waters; improving the efficiency in animal stranding response, and by developing joint education and outreach programs.

I. Introduction

The National Marine Sanctuary Program (NMSP) and Protected Resources Program (PRP) strategic planning process aims to increase the efficiency and effectiveness of the management and planning, education and outreach, and research and monitoring of protected resources within national marine sanctuaries. Both the NMSP and the PRP recognize that increased interagency collaboration during program planning and budgeting is necessary to accomplish NOAA's goals and objectives and to fulfill individual program requirements. The strategic goals of the planning workshop were to increase the collaboration between the NOAA line offices by learning about the offices and staff, and then by identifying and formalizing joint activities to build upon existing capabilities and improve the implementation of conservation and recovery actions within sanctuaries' waters.

The NMSP manages sanctuaries through the authority of Title III of the Marine Protection, Research, and Sanctuaries Act, the National Marine Sanctuary Act (NMSA). The NMSP serves as the trustee for a system of 14 underwater marine protected areas, encompassing more than 150,000 square miles of marine and Great Lakes waters from Washington State to the Florida Keys, and from Lake Huron to American Samoa. The system includes 13 national marine sanctuaries and the Northwest Hawaiian Islands Coral Reef Ecosystem Reserve, which is currently undergoing the formal sanctuary designation process. The NMSP is dedicated to fulfill its mission to protect and preserve America's ocean and Great Lakes treasures for this and future generations. Since passage of the NMSA in 1972, the sanctuary program has worked cooperatively with its partners and the public to protect and manage sanctuaries while maintaining compatible recreation and commercial activities, and has enhanced public awareness of our marine resources and marine heritage through scientific research, monitoring, exploration, educational programs, and outreach.

The PRP, along with regional offices, science centers, and partners, provides oversight and guidance to NOAA on the conservation of marine mammals protected under the Marine Mammal Protection Act (MMPA) and species listed as endangered or threatened under the Endangered Species Act (ESA), and their habitats. While other NOAA programs contribute to the implementation of these mandates, PRP is the only program in NOAA whose sole purpose is the implementation of these mandates and the protection and recovery of species. Outside of NOAA, PRP shares this responsibility with the Department of the Interior's Fish and Wildlife Service. The PRP develops, implements, and coordinates national policies for all provisions of these two statutes.

The program coordinates with NMFS regional and science center protected resources staff to minimize harassment of marine mammals and listed species, to develop recovery and conservation plans, to review listing petitions and determine their viability, to review and permit research on marine mammals and other listed species, to review and authorize Federal activities that might affect protected species, to reduce 'takes,' as defined by the ESA and MMPA, to implement management or regulatory actions to reduce bycatch of protected species in commercial and recreational fisheries, to develop marine wildlife interaction guidelines, to coordinate cooperative conservation agreements with partnering states, to consult under section 7(a) of the ESA on Federal actions which may effect a listed species, to administer the Marine Mammal Health and Stranding Response Program under the MMPA, and to increase environmental literacy, especially as it pertains to listed species.

Interagency coordination between PRP and NMSP is ongoing and incremental. The programs have documented collaborations of: management and planning, education and outreach, and science and monitoring. However, the effort was not standardized or elevated to a strategic level across both programs.

In the past, PRP and NMSP staffs have attended each other's meetings to provide updates on policy documents that may affect the management of protected resources in sanctuaries. For example:

- PRP staff attended the NMSP Leadership Team meetings in 2003 and 2004.
- PRP staff participated in the 2004 NMSP Research Coordinators' meeting.
- NMSP staff attended marine mammal stranding network regional meetings and training events in October 2004 and March 2005.
- NMSP staff presented at a brownbag lunch in PRP June 2005.

From these meetings, several topics requiring further discussion were identified including: the integration of PRP staff and issues on various Sanctuary Advisory Committee meeting agendas; the development of a Memorandum of Understanding (MOU) to cover coordination of personnel and activities during stranding events within sanctuary boundaries; and the need for a more strategic approach to our relationship consistent with the matrix management.

Interagency coordination on research and monitoring projects is already occurring between PRP and NMSP in numerous places across the United States. For example, the Pacific Islands Region currently assesses the status and population levels of humpback whales in the North Pacific Ocean through a cooperative research program called SPLASH (Structure of Populations, Levels of Abundance, and Status of Humpbacks). These two programs have jointly implemented SPLASH for several years. Also, the collaborative research in the Northeast on humpback whales conducted by the NMFS Northeast Fisheries Science Center and the Stellwagen Bank National Marine Sanctuary has been used as a model of collaborative work between the two programs.

PRP and NMSP have used joint education and outreach initiatives to reach common constituents. The NMSP has a well-developed education and outreach program with an established infrastructure to provide education and outreach materials to the joint NMSP/PRP constituents. The two programs established a working group comprised of staff from the PRP, NMFS Office of Law Enforcement, and NMSP to address education and outreach needs and identify areas for increased collaboration. The two offices collaborated on promotional articles for the highly visible and successful SPLASH program. PRP and NMSP also launched a collaborative program, Ocean Etiquette, to address common concerns on human impact issues during recreational activities. The Ocean Etiquette program promotes responsible encounters in the marine environment and builds on past coordination. Ocean Etiquette broadens the focus of the cooperative efforts to include policy and education/outreach efforts related to all forms of recreational human interaction in the natural environment (e.g., boating, wildlife viewing, tidepooling, recreational fishing).

Further coordination is occurring through the development of the acoustic criteria for marine mammals. These criteria could eventually affect actions ongoing within the sanctuaries. A report on how anthropogenic noise affects sanctuary resources in the Channel Islands National Marine Sanctuary (CINMS) was drafted in September 2004 and has already been a focus of several discussions by the CINMS Sanctuary Advisory Council. Other points

of coordination are happening through the acoustic lecture series, the large whale recovery efforts including the ship-strike strategy for northern right whales, and existing health and stranding response efforts. The need for the two agencies to consult under section 7(a) of the ESA is ongoing, often at a national or programmatic level, and this has been the focus of several discussions as well.

Although the existing collaborative activities are making incremental progress toward achieving the protection, conservation, and recovery of protected species, improved strategic planning will further this progress. The recovery and management of threatened resources and their habitat in sanctuaries can be improved through better inter-office coordination and budgeting between the two agencies. Addressing program planning and budgeting strategically will make better use of existing resources and will provide opportunities for value-added management and program implementation.

II. The Strategic Planning Process and Workshop

The development of the Protected Resources Strategic Planning Meeting occurred over six months of planning beginning in June 2004 with a dialog between the two programs about improving future collaborations. This dialog culminated in the execution of the workshop in December 2004. The planning process was divided into three phases: 1) workshop planning, 2) assessing the baseline conditions and regional priorities, and 3) implementing the strategic planning meeting.

Phase I: Planning by the Core Team

During the preliminary planning phase a core team was convened to design and carry out a strategic planning process and facilitate the workshop. The core team consisted of staff from both headquarters and field staff of both line offices. The core team held weekly and bi-weekly conference calls with headquarters, site, and regional staff to coordinate the meeting logistics, to develop the meeting's agenda and procedures, and to develop matrices of existing capabilities for conserving protected resources in sanctuaries. The core team is as follows:

National Marine Sanctuary Program

Dan Basta, Director, National Marine Sanctuary Program

Deidre Hall, Monterey Bay NMS

Margo Jackson, NMSP Headquarters

Craig MacDonald, Stellwagen Bank NMS

Seaberry Nachbar, Monterey Bay NMS

Holly Price, Monterey Bay NMS

Nathalie Ward, Stellwagen Bank NMS

Dave Wiley, Stellwagen Bank NMS

Vicki Wedell, NMSP Headquarters

Protected Resources Program

Bud Antonelis, NMFS Pacific Islands Fisheries Science Center

Cathy Campbell, NMFS Southwest Regional Office

Laura Engleby, NMFS Southeast Regional Office

Molly Harrison, NMFS Headquarters

Jill Lewandowski, NMFS Headquarters

Richard Merrick, NMFS Northeast Fisheries Science Center

Michael Payne, NMFS Headquarters

Donna Wieting, Deputy Director, NMFS Office of Protected Resources

Phase II: Assessing baseline conditions and regional priorities

During Phase II, matrices were created by the core team as a means to collect background and baseline information on what the NMSP and NMFS are currently doing together and separately in regards to key protected resources activities. The matrices were organized into three program themes: Management and Planning, Education and Outreach, and Research and Monitoring. Program activities under the legal authority or mandate of only one office or the other, but not for both, and for which collaboration would neither be effective nor prudent, were recognized but not further discussed in this collaborative effort.

To complete the baseline assessment of current protected resources activities in sanctuaries, the core team identified workshop participants by region and provided them with blank spreadsheets to complete prior to the workshop. The four regions were: the West Region (WR), the Pacific Islands Region (PIR), the Southeast/Gulf Region (SER), and the Northeast Region (NER). The NMFS Alaska Region did not participate in this process given that there are no marine sanctuaries in Alaska. Each attendee was asked to fill in the spreadsheet with information on what their office/sanctuary was currently doing within their region in regards to specific key protected resources activities. They were asked to also identify current collaborative projects and basic fiscal and staff resources involved with these collaborations so as to provide a baseline on costs and personnel associated with the project activities. Completing the spreadsheet for each of these themes resulted in a list of types of activities for which NMSP and PRP could collaborate resulting in a more efficient and coordinated effort.

Each of the workshop participants reviewed the regional spreadsheets and made a determination on the top ten primary activities and ranked them as regional priorities. The priorities were examined and aggregated by the core team and returned to the workshop participants just prior to the workshop.

Phase III: Implementing the Strategic Planning Workshop

The workshop included 44 participants, representing almost every NMSP sanctuary, NOAA Fisheries Regional Office, and NOAA Fisheries Science Center across the United States (Appendix A). Participants also included headquarters staff from both line offices. The participants were knowledgeable on the wide spectrum of programs, resources, priorities and needs of their respective locations and were tasked to think collaboratively about innovative ways to combine programs and resources between PRP and the NMSP to address protected resources priorities and needs in sanctuaries.

The Workshop Agenda is found at Appendix B of this report. The first day of the meeting provided an opportunity for the participants to discuss and learn about each respective program through a series of introductory presentations and a consensus-building exercise to reach agreement on the suite of regional priorities to be addressed during the bulk of the workshop. The regional matrices and the final regional priorities distributed at the workshop focused the regional breakout groups on identifying a subset of activities under each priority that could be discussed in detail during the majority of the workshop. During most of the meeting workshop participants were broken out into their respective regional groups. Although the original agenda called for participants to consider which projects would require a more national programmatic approach, it became apparent that those types of projects would rise to the surface after the regional break-out groups reviewed and reported out on their priority activities. Some participants were encouraged to participate in more than one regional group discussion, if their expertise was required there.

III. Activities and Outcomes

Each group identified priorities within the three key program themes: Management and Planning, Education and Outreach, and Research and Monitoring. The following five themes were common between some regions and were identified as national in scope.

- Improve inter-office coordination and communication
- Identify, conserve and recover protected resources: Planning and implementation
- Develop a shared Marine Animal Health and Stranding Response Network
- Improve education and outreach: Providing information to the public
- Increase monitoring and assessment of shared resources

Twenty activities were identified and project templates completed by the regional groups. Several regions focused on coordinating stranding response and collaborating on education and outreach initiatives, raising those to a national priority.

West Region (WR):

WR1: Continue SPLASH

WR2: Joint West Coast Marine Mammal/Ecosystem Survey (aka 'ORCAWALE')

WR3: West Coast Collaborative Research on Underwater Anthropogenic Noise

WR4: White Abalone Monitoring and Recovery in the Channel Islands NMS

WR5: West Coast Protected Resources Management and Policy Coordination

Pacific Islands Region (PIR):

PIR3: Develop a Coordinated Program to Assess, Characterize and Monitor NOAA's Federally Protected Marine Resources and Their Role in the Ecosystem

PIR4: Improve Federal Coordination on Development of Regulations and Environmental Assessments that Affect Protected Resources in Sanctuaries

Northeast Region (NER):

NE1: Implement a Cooperative Enforcement Plan in the Stellwagen Bank NMS

NE2: An Ocean Observing System for Identifying Anthropogenic Noise Sources/Levels and the Presence of Large Whales within the Stellwagen Bank NMS

NE3: Whale Watching Approach Regulations: Research, Develop and Educate

NE4: Mitigate Bycatch of Marine Mammals

NE5: Reducing Vessel Strikes of Large Whales within the Stellwagen Bank NMS

NE6: Stellwagen Bank NMS as a Model for Place-based Ecosystem-based Management

Southeast/Gulf of Mexico Region (SER):

SE2: Engage Sanctuaries in the Conservation and Recovery of Protected Species

SE3: Biological Monitoring of Federally Protected Species in the Sanctuaries of the Southeast/Gulf of Mexico Region

SE4: Characterize the Use of Sanctuary Habitat and/or Resources by Protected Species

Coordination of Marine Animal Stranding and Response Program

SE1: Improving Coordination for Marine Animal Health and Stranding Response

PIR2: Design an Integrated Marine Animal Health, Stranding and Rescue Response Program for Protected Species in the Pacific Islands

WR6: Improving Wildlife Stranding Response and Detection of Health Issues in NMSs

Coordination of Protected Resources Education and Outreach

WR7: West Coast Outreach and Education Coordination

PIR1: Enhance Education and Outreach Coordination

SE5: Create Joint Education and Outreach Program

IV. Benefits to NOAA

The strategic collaboration between the programs benefits NOAA by: providing additional science support for PRP and NMSP mandated responsibilities; leveraging resources resulting in cost savings with NOS/NMFS/NOAA through a shared infrastructure and expertise; and by leveraging a broader constituent support group (sanctuaries and coastal managers). Constituent education and outreach is enhanced by allowing PRP to share the expertise and educational and outreach infrastructure already established within NMSP. Our legislative mandates are better met by increasing our ability to coordinate mandatory planning, permitting and consultations thereby reducing the likelihood of potential unforeseen conflicts. The research ability of NOS and NMFS to “Analyze, Predict, Respond and Manage” is linked under one collaborative research plan thereby enhancing an ongoing collaborative research effort that integrates conservation of biota and habitats with place-based research and management. Finally, a much greater emphasis is placed on marine health issues by using sanctuaries as a place for implementing ecosystem approaches to management and improving the health in the marine and coastal environments. The implementation of these science-based conservation and management programs will ensure the availability of living marine resources and habitats for the benefit of society.

Finally, the effort builds much stronger partnerships. The most obvious of these would be between NOS and NMFS, and the National Marine Sanctuary Program and the Protected Resources Programs. However, relationships with the public and our constituent partners are also strengthened and it increases the potential of NOAA to interact and work with academia, environmental groups and other NGOs that currently work with one or the other organization, but generally not with both.

Linkages to the NOAA Strategic Plan

The collaborative workshop was convened with the focus of supporting the Ecosystem Mission Goal to “Protect, restore, and manage the use of coastal and ocean resources through an ecosystem approach to management” through the implementation of the requirements of the NMSA, ESA and MMPA. The NMSP/PRP effort contributes to both NOAA’s Ecosystem Goal Outcomes, to two of the seven Ecosystem Goal Performance Objectives, and to all five of the Ecosystem Goal Strategies presented in the NOAA Strategic Plan (2005-2010).

Ecosystem Goal Outcomes:

- *Healthy and productive coastal and marine ecosystems that benefit society.*
This outcome is crosscutting, focusing on shared capabilities of NMSP and NMFS to enhance, protect, and restore through ecosystem management.
- *A well-informed public that acts as a steward of coastal and marine ecosystems.*
This outcome will result from the increased visibility of the shared protected species programs inside and outside of NOAA. Through the implementation of local action with stakeholders, the program will achieve direct benefits to species and indirect benefits through the increased awareness and education of the public on protected and sensitive species and habitat conservation within the sanctuaries.

Ecosystem Goal Performance Objectives:

- *Increase the number of protected species that reach stable or increasing population levels*

This objective supports the Protected Species Program strategic goal of recovery and conservation of threatened and endangered species. It also supports the NMSP strategic goal to maintain natural biological communities in sanctuaries and to protect, and where appropriate, restore and enhance natural habitats, populations, and ecological process through innovative, coordinated and community-based measures and techniques.

- *Increase portion of population that is knowledgeable of and acting as stewards for coastal and marine ecosystem issues.*

The objective is to expand NOAAs capability to educate the public on the role of the sanctuaries in protecting and conserving species and their ecosystems through the development of educational materials and programs, and outreach. This objective supports the NMSP strategic goal to enhance the nation-wide public awareness, understanding and appreciation of marine ecosystems through outreach, education and interpretation efforts.

Ecosystem Goal Strategies:

- *Engage and collaborate with our partners to achieve regional objectives by delineating regional ecosystems, forming regional ecosystem councils, and implementing cooperative strategies to improve regional ecosystem health.*
- *Manage uses of ecosystems by applying scientifically sound observational, assessments, and research findings to ensure the sustainable use of resources and to balance competing uses of coastal and marine ecosystems.*
- *Improve resource management by advancing our understanding of ecosystems through better simulation and predictive models. Build and advance the capabilities of an ecological component of the NOAA global environmental observing system to monitor, assess, and predict national and regional ecosystem health, as well as to gather information consistent with established social and economic indicators.*
- *Develop coordinated regional and national outreach and education efforts to improve public understanding and involvement in stewardship of coastal and marine ecosystems.*
- *Engage in technological and scientific exchange with our domestic and international partners to protect, restore, and manage marine resources within and beyond the Nation's borders.*

Protected species are key components and indicators of healthy and sustainable ecosystems. The NMSP and PRP are addressing the protection and recovery of species and ecosystems under their jurisdiction in a regionally-integrated fashion. The strategies used encompass the full suite of education and outreach, research and monitoring, and management and planning strategies to accomplish this goal.

Long-term Program Planning and Budgeting

The framework used in NOAA to maximize resources and optimize our capabilities is the Programming, Planning, Budgeting, and Execution System (PPBES). PPBES is an integrated system that provides the structure to link NOAA's strategic vision with the details of programmatic planning and budgeting. The NMSP and PRP programs contribute to the NOAA Ecosystem Goal. Budgeting initiatives are implemented through the Ecosystem

Goal matrix programs. The partnership between the NMSP and PRP implements the Coastal and Marine Resources Matrix Program's capability of Ecosystem Approaches to Management of Coastal and Marine Resources, under the NMSP activity of Resource Protection and Stewardship. The effort also implements two of the three Protected Resources Matrix Program's capabilities of pursuing proactive conservation efforts and recovery and conservation of protected species.

Improved program outcomes include:

- Recovery (and maintenance) of all protected species to fully functioning elements of their ecosystems.
- Improved or maintained protected species status including abundance, distribution, productivity, and diversity.

IV. The Next Steps for Improved Coordination

The next step in the process to develop a long-term collaborative program was to further analyze the information provided in the project templates and to develop a draft implementation schedule and cost estimates for each of the priority activities. A Draft Project Implementation Schedule was developed after the workshop based on these activities (Appendix C). This type of schedule is used to direct and monitor implementation and completion of priority activities. Funding is required to complete the priority activities for fiscal years 2008-2012 was estimated based on information available at the time this workshop was convened. The amount needed to actually complete the activities may change as specific actions are pursued and status of resources varies. Some collaborative activities are already underway in FY05 without the need for additional resources or funding. Other projects and phases of existing projects will progress during FY06/07 with existing resources and priorities. However, many of the activities or new projects identified in the implementation schedule will require the commitment of additional resources through the program planning and budgeting process for FY08 and beyond.

Draft project evaluation criteria and procedures have been developed and will be reviewed by staff from both programs before being formally adopted. This process will provide an analytical structure to assess and prioritize future collaborative protected resources projects in sanctuaries. The second strategic planning meeting is being scheduled in in early 2006 and will provide an opportunity to further build on the partnership.

LIST AND DESCRIPTION OF APPENDICES

Appendix A: Workshop Participants

This appendix is the list of the workshop attendees who made up the regional breakout groups. Each geographic region includes representatives from the National Marine Sanctuary Program and the Protected Resources Program, including staff from headquarters offices, sanctuary sites, NMFS regional offices and NMFS science centers.

Appendix B: Strategic Planning Workshop Agenda

Appendix B is the three-day agenda from the Strategic Planning Workshop. Day one included an afternoon of program and personnel introductions, a summary of the NOAA program planning and budgeting system, and identification of regional project priorities. Breakout groups completed project templates on day two of the workshop. On the third day, the final national and regional priority projects were identified and discussed.

Appendix C: Draft Project Implementation Schedule and Cost Estimates by Region

Appendices C1-C4 are the DRAFT project implementation schedules and project cost estimates by geographic regions. Appendix C5 is the project implementation schedule and cost estimate for program coordination of the stranding and response network. Project abbreviations relate to the table presented on page 6 of the report. The schedule of activities and timeline associated with each project was estimated for fiscal years 2008-2012 to assess project integration into the NOAA Planning, Programming, Budgeting and Execution System. Regional program staff will review and amend these schedules at the next strategic planning meeting in 2006.

**APPENDIX A:
Workshop Participants**

Appendix A: Workshop Participants

West Region	
Todd Jacobs	NMSP West Regional Coordinator
Dan Howard	Cordell Bank NMS
Dierdre Hall	Monterey Bay NMS
Holly Price	Monterey Bay NMS
Karen Reyna	Gulf of the Farallones NMS
Jan Roletto	Gulf of the Farallones NMS
Chris Mobley	Channel Islands NMS
Carol Bernthal	Olympic Coast NMS
Brady Phillips	NMSP HQ
Jill Lewandowski*	NMFS HQ
Karin Forney	NMFS Southwest Fisheries Science Center
Tina Fahy/Cathy Campbell	NMFS Southwest Regional Office
salmon contact TBD	NMFS Southwest Regional Office
Brent Norberg	NMFS Northwest Regional Office
Linda Jones	NMFS Northwest Fisheries Science Center
Northeast Region	
Craig MacDonald	Stellwagen Bank NMS
David Wiley	Stellwagen Bank NMS
Columbine Culberg	NMSP HQ
Molly Harrison*	NMFS HQ
David Gouveia	NMFS Northeast Regional Office
Richard Merrick	NMFS Northeast Fisheries Science Center
Pacific Islands Region	
Naomi McIntosh	Hawaiian Islands Humpback Whale NMS
David Matilla	Hawaiian Islands Humpback Whale NMS
Malia Chow	Northwestern Hawaiian Islands CRER
Steve Gittings	NMSP HQ
Margo Jackson*	NMSP HQ
Michael Payne	NMFS HQ
Tamra Faris	NMFS Pacific Islands Regional Office
Bud Antonelis	NMFS Pacific Islands Fisheries Science Center
Southeast/Gulf of Mexico Region	
Greg McFall	Gray's Reef NMS
Cheva Heck	Florida Keys NMS
GP Schmahl	Flower Garden Banks NMS
Vicki Wedell*	NMSP HQ
Claire Johnson	NMSP HQ- education coordinator
Brad Barr	NMSP HQ
Cheryl Ryder	NMFS HQ- sea turtle team
Trevor Spradlin	NMFS HQ- health and stranding team
Phil Williams	NMFS HQ- endangered species
Laura Engleby	NMFS Southeast Regional Office

Floating: Dan Basta, Donna Wieting, Emily Menashes (PPBES); * denotes regional group facilitator

APPENDIX B:
Strategic Planning Workshop Agenda

PROTECTED RESOURCES STRATEGIC PLANNING WORKSHOP AGENDA

December 6-8, 2004
 NMFS Southwest Regional Office
 501 West Ocean Boulevard
 Long Beach, California 90802
 Tel: (562) 980-4000

Day One	Topic
1:00-3:30	<p>Welcome and Orientation to Workshop Goals and Process</p> <p>The purpose of the session is to introduce participants, understand the goals and expected outputs of the workshop, how these goals relate to the PPBES process, and become more familiar with the protected resources missions of the Sanctuary and NMFS offices.</p> <ol style="list-style-type: none"> 1. Welcome and overview of workshop goals (15 minutes) <ul style="list-style-type: none"> • <i>Dan Basta, National Marine Sanctuary Program</i> • <i>Donna Wieting, National Marine Fisheries Service</i> • <i>Rod McInnis, National Marine Fisheries Service</i> 2. Introduction of participants and regional planning groups (25 minutes) <ul style="list-style-type: none"> • <i>workshop participants</i> 3. Presentation by NMSP and NMFS on office missions, structures, goals and priorities in regards to protected resources issues (20 minutes) <ul style="list-style-type: none"> • <i>Brady Phillips, National Marine Sanctuary Program</i> • <i>Michael Payne, National Marine Fisheries Service</i> 4. Overview of PPBES process and its relation to workshop goals (5 minutes) <ul style="list-style-type: none"> • <i>Emily Menashes, National Marine Fisheries Service</i> 5. Presentation on development of workshop goals, outcomes, and process, review of agenda, and opportunities for participant Q&A (25 minutes) <ul style="list-style-type: none"> • <i>Vicki Wedell, National Marine Sanctuary Program</i> • <i>Jill Lewandowski, National Marine Fisheries Service</i>
3:30-3:45	Break
3:45-5:30	<p>Regional Group Breakout - Identification of Regional Priorities</p> <ul style="list-style-type: none"> ▪ <i>Regional Group Facilitators</i> <p>This session will take place in the regional groups and focus on discussions of the regional matrix and priority projects. A list will be provided to each regional group outlining the priority projects submitted in advance of the meeting. The groups will then discuss the highest priorities from this list and select five regional projects for discussion in detail during day two of the workshop.</p> <p><u>Outcomes:</u></p> <ol style="list-style-type: none"> 1. Ranked list of priority regional projects identified in the early afternoon session. 2. Identification of top five priority regional projects that will be discussed in detail for day two of the workshop.
7:00-10:00	Group dinner and social event – Aquarium of the Pacific, Long Beach

Day Two	Topic
8:30-10:30	<p>Regional Group Breakout- Discussion of Top Five Regional Priority Projects and Completion of Project Templates</p> <ul style="list-style-type: none"> ▪ <i>Regional Group Facilitators</i> <p>Regional groups will meet to discuss the top five regional priority projects selected from the previous day and identify details in implementing these projects. Regional groups will complete templates for each project that will help identify the project’s milestones, goals, timeline, human and fiscal resources, national level needs and other requirements needed for implementation. The group templates will then be presented to the large group at the end of the day.</p> <p><u>Outcome:</u></p> <ol style="list-style-type: none"> 1. Completion of template sheets for each top five regional priority project. 2. Identification of group member to present templates to large group during the session at the end of the day.
10:30-10:45	Break
10:45-12:30	SAME
12:30-1:30	Lunch on your own
1:30-3:30	SAME
3:30-3:45	Break
3:45-5:30	<p>Regional Group Presentations of Priority Project Templates</p> <p>Regional groups will have 25 minutes to present their top five projects to the large group.</p>
7:00-9:00	Dinner on your own
Day Three	Topic
8:30-10:30	<p>Large Group Session- Identification, Discussion and Planning of Programmatic Themes and National Level Needs</p> <p>The compiled top five project templates for each regional group will be reviewed as a whole and projects/needs from these projects requiring a programmatic or national level approach will be identified and discussed.</p> <p><u>Outcomes:</u></p> <ol style="list-style-type: none"> 1. List of projects/needs requiring a programmatic or national approach and discussion on how to implement these project/needs. 2. List of national level resources needed to implement these projects.
10:30-10:45	Break
10:45-12:30	<p>Large Group Session- Recap of Meeting Outcomes and Next Steps</p> <p>This session will require the large group to recap meeting outcomes, clearly identify next steps in implementing the priority projects from a planning and budgeting perspective, and discuss the final workshop report. If time allows, the large group will also discuss next steps beyond the top five projects to increase collaboration, such as “second tier” projects for future consideration and tools/ways to improve communication.</p>
Departure (lunch on your own)	

APPENDIX C:
Draft Project Implementation Schedules and Cost Estimates by Region

Appendix C1: Draft Project Implementation Schedule and Cost Estimates for Priority Activities FY08-FY12 for the West Region

Region & Project	Target Species	Outcome	Activities	FY08	FY09	FY10	FY11	FY12	Total Cost (X 1000)
WR1	Humpback whales	Increase information on abundance, population structure, population parameters, habitat and use, and human impacts	WR 1.1 Obtain a current estimate of overall abundance for the North Pacific	100	100	100	100	100	500
			WR 1.2 Identify the population structure of North Pacific humpback whales	75	75	75	75	75	375
			WR 1.3 Determine key population parameters	0	0	0	0	0	0
			WR 1.4 Identify habitat and characterize use	0	0	0	0	0	0
			WR 1.5 Examine human impact	0	0	0	0	0	0
			<i>Project Subtotals</i>	175	175	175	175	175	875
WR2	Marine mammals	Obtain abundance estimates, baseline data on marine mammals and habitat, monitoring status of marine mammals and habitats	WR 2.1 Conduct marine mammal survey every 4 years	200	0	200	0	200	600
			WR 2.2 Meet NMFS and NMS objectives	0	0	0	0	0	0
			WR 2.3/4 Obtain marine mammal/ecosystem data for marine mammal assessment	0	0	0	0	0	0
			WR 2.5 Outreach and education about protected species and habitat monitoring	75	75	75	75	75	375
			<i>Project Subtotals</i>	275	75	275	75	275	975

Region & Project	Target Species	Outcome	Activities	FY08	FY09	FY10	FY11	FY12	Total Cost (X 1000)
WR3	Marine mammals	Increase information on anthropogenic noise to feed into national assessment of anthropogenic sound on marine mammals	WR 3.1 Coordinate with relevant agencies and research institutions to develop collaborative program	50	50	50	50	50	250
			WR 3.2 Join monitoring program	200	200	200	200	200	1000
			WR 3.3 Evaluate management impacts; continue longterm monitoring as needed	0	0	0	0	0	0
			Project Subtotals	250	250	250	250	250	1250
WR4	White abalone	Increase the number of white abalone in the CINMS in the wild	WR 4.1 Assess wild abalone	50	0	50	0	50	150
			WR 4.2 Identify potential outplant sites	50	0	0	0	0	50
			WR 4.3 Outplant abalone	0	50	50	0	0	100
			WR 4.4 Monitor outplants	0	25	50	50	50	175
			WR 4.5 Develop outreach and education plan	50	25	25	25	25	150
			Project Subtotals	150	100	175	75	125	625
WR5	Marine mammals white abalone sockeye salmon	Ensure early coordination to keep both line offices of NOAA working together for a common outcome/goal.	WR 5.1 Liaisons identified	0	0	0	0	0	0
			WR 5.2 Hold annual meetings	35	35	35	35	35	175
			WR 5.3 Increase number of collaborative efforts	0	0	0	0	0	0
			WR 5.4 Evaluate efforts	0	0	0	0	0	0
			Project Subtotals	35	35	35	35	35	175

Region & Project	Target Species	Outcome	Activities	FY08	FY09	FY10	FY11	FY12	Total Cost (X 1000)
WR7	Listed species in area sanctuaries	Ensure consistent messaging; develop targeted outreach and education campaigns for high priority issues	WR 7.1 Educator team meeting	40	40	40	40	40	200
			WR 7.2 Targeted Campaigns	0	0	0	0	0	0
			WR.7.3 Identify gaps and new opportunities	0	0	0	0	0	0
			<i>Project Subtotals</i>	40	40	40	40	40	200
			<i>Regional FY Totals</i>	925	675	950	650	900	4100

Appendix C2: Draft Project Implementation Schedule and Cost Estimates for Priority Activities FY08-FY12 for the Southeast/Gulf of Mexico Region

Region & Project	Target Species	Outcome	Activities	FY08	FY09	FY10	FY11	FY12	Total Cost (X 1000)
SER2	Green loggerhead, Kemp's ridley, hawksbill and leatherback turtles; North Atlantic right and humpback whales; smalltooth sawfish, elkhorn, staghorn, and fused-staghorn corals	Improve prospects of species recovery through more effective planning and implementation of conservation programs Information on species of interest to incorporate into the Encyclopedia of the Sanctuaries	SER 2.1 Dissemination of recovery plans to sanctuary staff	0	0	0	0	0	0
			SER 2.2 Identify mechanism and strategy for improved communication/coordination/cooperation	0	0	0	0	0	0
			SER 2.3 Participation of sanctuary staff in national recovery coordinators meeting	20	0	20	0	20	60
			SER 2.4 Develop working group to develop gap analysis and integration plan	10	10	10	10	10	50
			SER 2.5 Sanctuary recovery planning meeting – develop action plan	25	0	25	0	25	75
			SER 2.6 Update Encyclopedia of the Sanctuaries	0	0	0	0	0	0
			Project Subtotals	55	10	55	10	55	185

Region & Project	Target Species	Outcome	Activities	FY08	FY09	FY10	FY11	FY12	Total Cost (X 1000)
SER3	Turtles, coral grouper, elasmobranches, whales and other marine mammals	Improved understanding of resources to focus protection and conservation efforts	SER 3.1 Identify protected species in NMS	0	0	0	0	0	0
			SER 3.2 Identify long-term index sites	0	0	0	0	0	0
			SER 3.3 Link data form permitting activities in NMS that do not require NMSP permit	0	0	0	0	0	0
			SER 3.4 Hold coordination meeting to discuss annual research occurring in NMS	35	0	0	35	0	70
			SER 3.5 Write comprehensive results booklet for monitoring projects	25	25	25	25	25	125
			Project Subtotals	60	25	25	60	25	195
SER4	Including but not limited to: Marbled grouper, speckled hind grouper, Warsaw and goliath grouper, and sea turtles	Improved understanding of resources to focus protection and conservation efforts	SER 4.1 Catalog and synthesize current and previous surveys and data sets	20	0	0	0	0	20
			SER 4.2 Exchange information and identify ways to enhance existing knowledge base	30	0	30	0	30	90
			SER 4.3 Research and Monitoring	0	100	100	100	100	400
			Project Subtotals	50	100	130	100	130	510

Region & Project	Target Species	Outcome	Activities	FY08	FY09	FY10	FY11	FY12	Total Cost (X 1000)
SER5	Dolphins; sea turtles	Improved responsibility of wildlife viewing of target species with commercial operators and individual boaters	SER 5.1 Regional working group	25	25	25	25	25	125
			SER 5.2 Joint outreach products	35	0	35	0	35	105
			SER 5.3 Materials with responsible wildlife viewing information	0	0	0	0	0	0
			SER 5.4 Fisheries viewing guidelines on sanctuary websites	0	0	0	0	0	0
			SER 5.5 Media messaging	0	0	0	0	0	0
			SER 5.6 Messaging through volunteer groups	0	0	0	0	0	0
			SER 5.7 Information in existing and future centers and partnerships	0	0	0	0	0	0
			SER 5.8 Communications plan	25	0	25	0	25	75
			Project Subtotals	85	25	85	25	85	305
						250	160	295	195
			Regional FY Totals						

Appendix C3: Draft Project Implementation Schedule and Cost Estimates for Priority Activities FY08-FY12 for the Northeast Region

Region & Project	Target Species	Outcome	Activities	FY08	FY09	FY10	FY11	FY12	Total Cost (X 1000)
NER1	Marine mammals – whales	Increase compliance of cooperative enforcement of existing regulations within the Stellwagen Bank NMS	NER 1.1 At-sea enforcement	200	200	200	200	200	1000
			NER 1.2 Increase prosecution	0	0	0	0	0	0
			Project Subtotals	200	200	200	200	200	1000
NER2	Large whales	Characterize ocean noise and detection of large whales	NER 2.1 Moored passive acoustic buoy (ARU) deployment, retrieval, and data download	100	100	0	0	0	200
			NER 2.2 Data analysis for ARUs deployed during FY06-FY09	100	100	100	0	0	300
			Project Subtotals	200	200	100	0	0	500

Region & Project	Target Species	Outcome	Activities	FY08	FY09	FY10	FY11	FY12	Total Cost (X 1000)
NER3	Marine mammals – whales	Increased protection for marine mammals from whales watching activities	NER 3.1 Approach regulations	100	100	100	100	100	500
			NER 3.1.1 Research	0	0	0	0	0	0
			NER 3.1.2 Management	0	0	0	0	0	0
			NER 3.2 Outreach and Education	50	50	50	50	50	250
			NER 3.2.1 Commercial whale watch vessels	0	0	0	0	0	0
			NER 3.2.2 Recreational boaters	0	0	0	0	0	0
			Project Subtotals	150	150	150	150	150	150
NER4	Marine mammals – common dolphin, pilot whales	Increased bycatch mitigation	NER 4.1 Estimation	75	75	75	75	75	375
			NER 4.2 Take reduction	100	100	100	100	100	500
			NER 4.3 Gear research	100	100	100	100	100	500
			NER 4.4 Dtag	50	50	50	50	50	250
			NER 4.5 Gear Buyback	0	0	0	0	0	0
			Project Subtotals	325	325	325	325	325	325

Region & Project	Target Species	Outcome	Activities	FY08	FY09	FY10	FY11	FY12	Total Cost (X 1000)
NER5	Marine mammals – whales	Identity where and when vessel strikes occur in the sanctuary, determine the causal relationship and what mitigation measures might be necessary and appropriate	NER 5.1 Maintain vessel Automated Identification System (AIS)	50	50	50	50	50	250
			NER 5.2 Analyze vessel speed data obtained from AIS relative to the risk of ship strikes within and around the NMS	50	50	0	0	0	100
			NER 5.3 Analyze the response of large whales to vessel sound	100	100	0	0	0	200
			NER 5.4 Analysis of the vertical and horizontal distribution of large whales within the SBNMS	50	50	50	50	0	200
			Project Subtotals	250	250	100	100	50	750
			Regional Totals	1125	1125	875	775	725	4625

Appendix C4: Draft Project Implementation Schedule and Cost Estimates for Priority Activities FY08-FY12 for the Pacific Islands Region

Region & Project	Target Species	Outcome	Activities	FY08	FY09	FY10	FY11	FY12	Total Cost (X 1000)
PIR1	ESA-listed species in area sanctuaries	Improve decision making and coordination between NMS and NMFS, and state and federal partners	PIR 1.1 Improve efficiency of permitting, planning, and consultation requirements	0	0	0	0	0	0
			PIR 1.2 Integrate consultation and recovery with place-based research and mgt.	0	0	0	0	0	0
			PIR 1.3 Enhance constituent education and outreach opportunities	50	50	50	50	50	250
			PIR 1.4 Define role of Hawaiian Island NMS in non-humpback whale marine resource management	0	0	0	0	0	0
			PIR 1.5 Improve inter-office communication	0	0	0	0	0	0
			Project Subtotals	50	50	50	50	50	250

Region & Project	Target Species	Outcome	Activities	FY08	FY09	FY10	FY11	FY12	Total Cost (X 1000)
PIR2	Humpack whales, false killer whales, monk seals, and sea turtles	To ensure better information for resource management, gathered in a more cost-efficient manner, and at a scope that neither NMSP or PR could achieve individually	PIR 2.1 SPLASH	0	0	0	0	0	0
			PIR 2.2 Acoustic environment	100	100	100	100	100	500
			PIR 2.3 False killer whales	50	100	0	100	100	350
			PIR 2.4 Factors affecting protected resource pop. recovery	100	100	100	100	100	500
			PIR 2.5 Monk seal prey	100	100	100	100	100	500
			PIR 2.6 Habitat Loss	125	25	25	25	25	225
			PIR 2.7 Vessel and Aircraft Allocation	100	100	100	100	100	500
			PIR 2.8 NWHI Regional Science Plan	0	50	0	0	50	100
			Project Subtotals	575	575	425	525	575	2675
PIR4	ESA-listed species in area sanctuaries	Long-term program that builds stronger stewardship ethics and reduces inappropriate interactions	PIR 4.1 Shared definitions – education and outreach	0	0	0	0	0	0
			PIR4.2 Implement Ocean Etiquette program	75	75	75	75	75	375
			Project Subtotals	75	75	75	75	75	375
			700	700	550	650	700	3300	
			Regional FY Totals						

Appendix C5: Draft Project Implementation Schedule and Cost Estimates for Priority Activities FY08-FY12 for Coordinating the Stranding and Response Networks – National Plan

Region & Project	Target Species	Outcome	Activities	FY08	FY09	FY10	FY11	FY12	Total Cost (X 1000)
National Includes: WR6 PIR2 SE1	Marine mammals and sea turtles	Improved Coordination on Marine Life Stranding Response. NOTE: no funds are needed to create the MOUs. However, additional funds may be needed, depending on the arrangement.	NAT 1.1 Develop MOU for Marine Mammal Health, Stranding, and Response	0	0	0	0	0	0
			NAT 1.2 Develop MOU for Sea Turtle Health, Stranding, and Response	0	0	0	0	0	0
			Implementation Totals	2675	2535	2495	2145	1170	11020