

Preliminary Work Plan and Timeline

(Approved 1-29-07 by MRWG & 1-30-07 by OPAC, subject to future revisions)

February 23, 2007

Fm: OPAC Marine Reserve Working Group (MRWG)

Subj: Oregon Marine Reserve Framework Plan: *Preliminary Work Plan and Timeline* (2007-2009)

BACKGROUND

Development of this work plan was requested by the full OPAC in order to help outline 2007-2009 budget and staffing needs to implement Phase I of the *2002 OPAC Marine Reserve Recommendation*, as Governor Kulongoski requested of OPAC in his June 30, 2005 charge to the newly-seated advisory council. Phase I calls for the development of an ***Oregon Marine Reserve Framework Plan*** during the 2007-2009 biennium. This will be followed by a Phase II (2009-2011) which will include local-level designation and planning for individual reserves, based on the coastwide framework.

ACTIONS TAKEN: January 29-30, 2007

1. At its January 29, 2007 meeting, OPAC's MRWG approved by consensus the attached *Preliminary Oregon Marine Reserve Work Plan* (Phase I) and timeline, acknowledging that changes and refinements will be made as the process proceeds. On January 30, 2007, the full OPAC similarly approved the *preliminary* work plan and timeline with the same understanding.
2. The OPAC MRWG agreed by consensus that the MRWG is "Marine Reserve Planning Committee" envisioned in the 2002 OPAC I recommendation. To do otherwise would unnecessarily delay the process, they found. The MRWG also decided to move ahead with MRWG membership expansion to conform more closely to the 2002 marine reserve recommendation. To expand membership, the MRWG agreed to identify needed categories of new members, considering existing membership, and solicit nominees for consideration by a MRWG member selection committee, and ultimately approval by the OPAC Executive Committee. They also agreed that membership should be kept as small as possible to facilitate the conduct of business, but recognizing that key interests needed to be at the table (see Task 1.2).
3. The MRWG also agreed to ask Oregon state agency department heads (assuming funding or existing resources are available) to identify a Marine Reserve Staff Team (MR-STAFF) to support to the MRWG in the development of an ***Oregon Marine Reserve Framework Plan***; Federal liaisons to the MR-STAFF also need to be identified as appropriate (see Task 1.3).
4. The MRWG also agreed to request that the STAC establish a scientific and technical subcommittee (MR-STAC) following the process laid out in the work plan (see Task 1.4).

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Task Summary (Phase I)
Oregon Marine Reserve Framework Plan

* Tasks in **BLUE** are initial MRWG work scheduled to be completed by June 30, 2007 with existing financial resources and agency support.

Task 1: Getting Started

- Task 1.1 Develop a draft work plan, budget, staffing plan, and timeline for development of the Oregon Marine Reserve Framework Plan (MRWG and MR-STAFF)
- Task 1.2 Expand MRWG to include representation envisioned in the 2000 MR Recommendation (MRWG)
- Task 1.3 Identify a MR Staff Team (MR-STAFF) to lead/support the MR Planning Process
- Task 1.4 Identify and appoint a MR-STAC Subcommittee to assist and provide information for Marine Reserve planning (OPAC STAC & MRWG)

Task 2: Prepare Oregon Coast Ecological & Socioeconomic Profile & GIS for MR Planning

- Task 2.1 Develop Profile Outline and Identify Relevant Information (MR-STAFF, MR-STAC)
- Task 2.2 Prepare a *draft* Oregon Coast Ecological and Socioeconomic Profile & GIS (MR-STAFF, MR-STAC, & Contractors)

Task 3: Prepare the Marine Reserve Issues and Policy section (goals, objectives, and design considerations/criteria) of the *Oregon Marine Reserve Framework Plan*.

- Task 3.1 Develop *Working Draft 1* of Marine Reserve Issues and Policies (goals, objectives, and design considerations/criteria) based on MRWG deliberations (MRWG, MR-STAFF, MR-STAC)
- Task 3.2 Develop *Working Draft 2* of Marine Reserve Issues and Policies based on multiple stakeholder workshops (MRWG, MR-STAFF, MR-STAC)
- Task 3.3 Develop *Working Draft 3* of Marine Reserve Issues of Marine Reserve Issues and Policies based on multiple public workshops (MRWG, MR-STAFF, MR-STAC)
- Task 3.4 Develop *Final Draft* of Marine Reserve Issues and Policies for full OPAC consideration/adoption (MRWG, MR-STAFF, MR-STAC, OPAC)

Task 4: Identify Candidate Marine Reserve Regions and/or Sites

- Task 4.1 Identify Candidate Marine Reserve Regions and/or Sites as part of the MRWG, stakeholder, and public workshops in Tasks 3.1 to 3.3

Task 5: Define the formal approval process for adoption and implementation of the *Oregon Marine Reserve Framework Plan*, and options for subsequent monitoring, enforcement, and adaptive management of the Oregon system of marine reserves.

- Task 5.1 Audit existing authorities and potential need for new or amended authorities to implement Oregon marine reserves (MR-STAFF, AG Office, MR-STAC).
- Task 5.2 Outline legal-institutional options adoption, implementation, enforcement, monitoring, and adaptive management of marine reserves.

Task 6: Assess potential ecological, social, economic, and other impacts (Phase I).

- Task 6.1 Toward the end of the Phase I process, the MR-STAC and MR-STAFF, with advice from the MRWG, develop a framework for the impact assessment.
- Task 6.2 The MR-STAC, MR-STAFF, or a contractor will conduct the Phase I impact assessment, with public and/or stakeholder meetings to review and take input toward a final report.

Task 7: Design the Phase II Marine Reserve Planning Process.

- Task 7.1 Identify a Phase II Marine Reserve Planning Process Subcommittee.
- Task 7.2 Develop a draft Phase II process for review/consideration of the MRWG and full OPAC.

Task 8: OPAC Review and Approval of Phase I *Oregon Marine Reserve Framework Plan*

Phase I Oregon Marine Reserve Planning ***Oregon Marine Reserve Framework Plan***

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Key Players in the Marine Reserve Process

It is anticipated that the following groups will play key roles in planning and implementing Marine Reserves within Oregon's three-nautical-mile Territorial Sea. Abbreviations for these groups are used throughout this work plan.

- A. MR Working Group (MRWG) – OPAC members and others as appointed who guide the planning process. Will include ocean users with emphasis on affected fishing groups, other recreation groups, conservationists, marine natural and social scientists, and agency representatives as per OPAC 2002 Recommendation. Appointed with understanding that there are presently no funds to support travel and participation.
- B. MR STAC (MR-STAC) – A subcommittee of the STAC established to support the OPAC Marine Reserve planning process by providing science summaries, geographic information system (GIS) maps, reserve design assistance, and other information needed to make MR decisions. Identified by the OPAC STAC with input from MRWG members. Appointed with understanding that there are presently no funds to support work, travel, and participation (see proposed budget for hoped-for resources).
- C. MR Planning/Technical Staff (MR-STAFF) – Assuming funding or other resources are secured, MR-STAFF will include agency personnel from DLCD, ODFW, OPRD, DSL, DEQ, and other state agencies as appropriate and organized as a team (see proposed budget); for 2007-2009, MR-STAFF will also benefit from the work of DLCD's Ocean GIS coastal management fellow. MR-STAFF may also include Federal agency personnel as appropriate and available.
- D. Stakeholders: fishers, other ocean users, conservationists, public-at-large, others. Through a series of public and interest group workshops, stakeholders and the general public will be engaged at every step in the planning process. Currently no funds available for this process (see proposed budget).
- E. State Boards and Commissions. Although an approval/implementation process is yet undefined, it may include the State Land Board, the Fish and Wildlife Commission, the Land Conservation and Development Commission, the Parks and Recreation Commission, the Environmental Quality Commission, and possibly others.

Anticipated Phase I Products

The following products will be developed and integrated as components of an ***Oregon Marine Reserve Framework Plan***, as envisioned by the 2002 OPAC recommendation on Oregon Marine

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Reserves and informed by recent OPAC and MRWG deliberations. Some sections may be issued as separate reports, combined, or added as necessary.

Part 1: Oregon Marine Reserve Ecological and Socioeconomic Profile & GIS

Part 2: Coastwide Marine Reserve Issues and Policies (Goals, Objectives, and Design Considerations/Criteria)

Part 3: Oregon Marine Reserve Candidate Regions/Sites

Part 4: Phase I Assessment of Potential Ecological, Social, Economic, and Other Impacts of Marine Reserves

Part 5: General Process for Adoption and Implementation of the *Oregon Marine Reserve Framework Plan* (including options for monitoring, enforcement, and adaptive management of the Oregon system of marine reserves)

Part 6: Phase II Planning Process, Timeline, Staffing Plan and Budget

Phase I Planning Process: *Oregon Marine Reserve Framework Plan*

* Tasks in **BLUE** are initial work scheduled to be completed by June 30, 2007 with existing financial resources and agency support

Task 1: Getting Started

This task involves development of a draft work plan, budget, and timeline for Phase I Marine Reserve planning and the organization and identification of members of the MRWG, MR-STAFF, and MR-STAC necessary to support the effort.

Task 1.1 **Develop a draft work plan, budget, staffing plan, and timeline for development of the Oregon Marine Reserve Framework Plan**

- a. Develop and approve draft work plan and timeline for accomplishing tasks
- b. Develop proposed budget and staffing plan for agency and other technical and planning process support

Task 1.2 **Expand MRWG to include representation envisioned in the 2000 OPAC Marine Reserve Recommendation** (MRWG Chair and subgroup appointed by Chair)

- a. Identify the interests represented by core membership appointed earlier by OPAC
- b. Identify additional interests that need to be represented (facilitated discussion)
- c. Seek nominees for MRWG membership to fill identified needs
- d. Select additional members for recommendation to OPAC (MRWG Chair and subgroup appointed by Chair)
- e. Appoint additional members to the MRWG (OPAC appoints on recommendation of existing MRWG)

Task 1.3 **Identify Planning & Technical Staff (MR-STAFF) to lead/support the MR Planning Process.**

- a. As per the 2002 MR Recommendation, it is anticipated that DLCD will lead the planning process and that ODFW will lead the technical effort

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- b. Actual make-up and roles of the staff support team will be decided by agencies.
- c. DLCD will be employing a Ocean GIS coastal management fellow for 2007-09 (funded by NOAA)
- d. Assuming funding is secured, additional staff from DLCD, ODFW, OPRD, DSL, DEQ, and other agencies as appropriate may be included in the agency team (see proposed budget).

Task 1.4 Working with STAC, identify a MR-STAC Subcommittee to assist with and provide information for Marine Reserve planning (see description above for functions).

- a. Identify needed MR-STAC expertise, e.g., natural and social scientists, GIS specialists (OPAC STAC in collaboration with MRWG).
- b. Identify potential members/volunteers for the MR-STAC from university, agency, NGO, ocean user, and other sources (OPAC STAC in collaboration with MRWG).
- c. Based on needs and potential members, STAC will establish/appoint the MR-STAC Subcommittee (STAC with approval of OPAC Chair and Vice Chair).

Task 2: Prepare Oregon Coast Ecological and Socioeconomic Profile & GIS for Marine Reserve Planning

This may take the form of a *comprehensive profile* or *series of white papers*, for example, on relevant biological, oceanographic, socioeconomic, and governance information needed to design and site marine reserves, and to identify what might be learned from post-reserve designation monitoring and evaluation. The cataloging of relevant spatial information in a publicly-accessible *Ocean GIS* would be a key feature of the system. This task is largely a technical one, with heavy involvement of staff and scientific/technical advisors. It will be based on the best available science, informed by local ecological and socioeconomic knowledge. New data collection efforts may be initiated as part of this process, but only if essential to the marine reserve planning process. *Note: Exactly what the contents of the proposed profile/GIS will be and the process for achieving this task will be determined by the OPAC STAC and the MR-STAC.*

Task 2.1 Develop Profile Outline and Identify Relevant Information (MR-STAC, MR-STAFF, MRWG)

- a. MR-STAFF and MR-STAC conduct workshop with MRWG to identify desired ecological and socioeconomic information for MR planning, including data needed for designing a coastwide network of marine reserves. Assess data availability. Include for stakeholder and public input.
- b. MR-STAFF and MR-STAC develop **annotated outline** for the Oregon Coast Ecological and Socioeconomic Profile & GIS

Task 2.2 Prepare a *draft* Oregon Coast Ecological and Socioeconomic Profile & GIS (MR-STAFF, MR-STAC, & Contractors)

- a. Through a combination of MR-STAFF and contract work, develop individual components and synthesize for a draft report and GIS
- b. MR-STAFF organize and conduct peer review of the Profile & GIS with the scientific and stakeholder communities.

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- c. Present the Oregon Coast Ecological and Socioeconomic Profile & GIS for Marine Reserve Planning to stakeholders and the public at a workshop; use this workshop to assist with other tasks as appropriate.

Task 3: Prepare the Marine Reserve Issues and Policy section of the *Oregon Marine Reserve Framework Plan* (issues, goals, objectives, and design considerations/criteria).

For this task, *Issues* are the problems or opportunities that are driving the general demand for marine reserves from a coastwide perspective. *Policy* includes goals, objectives, and design considerations/criteria, defined as follows:

Goals are the broad statements of what marine reserves might accomplish—often, they are simply problems or opportunities stated in positive terms.

Objectives are the concise, measurable statements of action that will lead toward accomplishment of your goals.

Design considerations/criteria are the guidelines and/or rules that enable choices, decisions, or judgments to be made. For example, it is anticipated that design considerations/criteria may be developed for the number, size, spacing, location (e.g., area inclusion and exclusion), and type of marine reserves from a coastwide perspective.

In addition, this task may include a beginning effort for identifying *Candidate Marine Reserve Regions and/or Sites* (described in more detail in Task 4 below).

Task 3.1 *Develop Working Draft 1 of Marine Reserve Issues and Policy based on MRWG deliberations* (MRWG, MR-STAFF, MR-STAC)

- a. Through a set of professionally-facilitated workshops, the MRWG (with input from a MR-STAC) will identify an initial set of issues, goals, objectives, and design considerations/criteria for marine reserves from a coast-wide perspective. This is assumed to be low-expense task, requiring only regular staff- and facilitator-supported meetings of the MRWG, and input from a MR-STAC workshop
- b. Publish *Working Draft 1*, conduct full OPAC review, and make available to stakeholders and the public, including in web. *Working Draft 1* will be used as a starting point for working with stakeholders and the public in subsequent rounds.

Task 3.2 *Develop Working Draft 2 of Marine Reserve Issues and Policy based on multiple stakeholder workshops* (MRWG, MR-STAFF, MR-STAC)

- a. Through a set of professionally-facilitated workshops with stakeholders, review, suggest alternative options, and add to *Working Draft 1*. Stakeholders may include specific recreational and commercial fishing groups, others in the seafood industry, other ocean recreation interests, the environmental community, ports and local communities, wave energy groups, and others who could be affected by MR designation. Stakeholders would have an opportunity to react/add ideas on the *Working Draft 1*. The intent is to involve and give fair hearing to all potentially-affected groups.
- b. Provide opportunities during this series of workshops for preliminary identification of candidate regions/sites for marine reserves, from a coast-wide perspective.
- c. The MR-STAFF, working with the MRWG and MR-STAC will synthesize the results of stakeholder workshops into a *Working Draft 2*.
- d. Publish *Working Draft 2* and make available to stakeholders and the public, including in web. This *Draft* will be used as a starting point for a series of public workshops.

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Task 3.3 Develop Working Draft 3 and Final Draft of Marine Reserve Issues and Policy based on multiple public workshops and OPAC Review (MRWG, MR-STAFF, MR-STAC, OPAC)

- a. Conduct a series of *public workshops*, using the *Working Draft 2* as a basis, to get additional input and suggestions on issues, goals, objectives, design considerations/criteria, and candidate regions/sites for marine reserves (if identified), all from a coastwide perspective.
- b. MR-STAFF, working with the MRWG and MR-STAC will synthesize the results of public workshops into *Working Draft 3*.
- c. The full OPAC will conduct public hearings on *Working Draft 3*, incorporate appropriate changes, approve as the *Marine Reserve Issues and Policy* section of the ***Oregon Marine Reserve Framework Plan***.
- d. Publish *Marine Reserve Issues and Policy* as a section of the ***Oregon Marine Reserve Framework Plan*** and, with other sections, forward to the Governor and appropriate boards and commissions for their review. Also make available to stakeholders and the public, including on the OPAC web site. The ***Oregon Marine Reserve Framework Plan*** will be used as a starting point for the Phase II Marine Reserve Planning Process.

Task 4: Identify Candidate Marine Reserve Regions and/or Sites

The OPAC 2002 recommendation on marine reserves anticipated that identification of specific sites for marine reserves would be left to the local-level Phase II process. It states that “Although some reserve areas may be identified in the Oregon Coast framework plan [Phase I], the exact location, shape, and size of reserves areas will depend on many local factors...” (page 14, Report and Recommendation to the governor: Oregon and Marine Reserves). With this in mind, OPAC and the MRWG will provide the opportunity for stakeholder groups and local areas to recommend areas for reserve consideration and/or even propose specific areas for which a consensus can be developed among all interests and that have been vetted through the MR-STAC for their usefulness in meeting conservation goals and serving as ecological reference areas.

Task 4.1 Identify Candidate Marine Reserve Regions and/or Sites as part of the MRWG, stakeholder, and public workshops in Tasks 3.1 to 3.3

- a. For each Task 3 meeting or workshop, provide opportunity for identification of marine reserve regions and/or sites based on the evolving *Marine Reserve Issues and Policy* section.
- b. MR-STAFF, working with the MRWG and MR-STAC, will synthesize *Candidate Marine Reserve Regions and/or Sites*, and subject each site to rigorous evaluation based on the *Marine Reserve Issues and Policy* identified in Task 3.
- c. OPAC will conduct public hearings, incorporate changes, and approve the *Candidate Marine Reserve Regions and/or Sites* section of the ***Oregon Marine Reserve Framework Plan***.
- d. Publish *Candidate Marine Reserve Regions and/or Sites* as a section of the ***Oregon Marine Reserve Framework Plan*** and, with other sections, forward to the Governor and appropriate boards and commissions for their review. Also make available to stakeholders and the public, including on the OPAC web site. The ***Oregon Marine Reserve Framework Plan*** will be used as a starting point for the Phase II Marine Reserve Process.

Task 5: Define the formal approval process for adoption and implementation of the *Oregon Marine Reserve Framework Plan*, along with options for subsequent monitoring, enforcement, and adaptive management of the Oregon system of marine reserves.

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Identifying the roles and structure for adoption and implementation of resource management plans is an important part of any planning process so that those involved in the planning can understand how their decisions will be carried out and what resources will be needed by which agencies or groups. Although the exact approval and implementation process is not yet clear, this may include the State Land Board, the Fish and Wildlife Commission, the Land Conservation and Development Commission, the Parks and Recreation Commission, the Environmental Quality Commission, and possibly others.

Task 5.1 Audit existing authorities and potential need for new or amended authorities to implement Oregon marine reserves (MR-STAFF, AG Office, MR-STAC).

Task 5.2 Outline legal-institutional options adoption, implementation, enforcement, monitoring, and adaptive management of marine reserves. Include plans/time frames for periodic review and adjustment. MRWG and OPAC will review and, if appropriate, recommend a preferred option.

- a. Identify potential roles for coastwide and/or local-level MR stakeholders in the implementation process.
- b. Include proposed adoption and implementation options as a section in the published ***Oregon Marine Reserve Framework Plan***.

Task 6: Assess potential ecological, social, economic, and other impacts (Phase I).

The potential impacts of the proposed system of marine reserves will not be able to be ascertained until actual reserve sites, boundaries, and permitted activities are identified in Phase II. However, a preliminary assessment as part of Phase I will provide OPAC, stakeholders, the public, and agencies that will need to adopt and implement marine reserves with a rough sense of potential impacts.

Task 6.1 Toward the end of the Phase I process, the MR-STAC and MR-STAFF, with advice from the MRWG, develop a framework for the impact assessment.

Task 6.2 The MR-STAC, MR-STAFF, or a contractor will conduct the Phase I impact assessment, with public and/or stakeholder meetings to review and take input toward a final report. Include the report on potential ecological, social, economic, and other impacts as a section in the published ***Oregon Marine Reserve Framework Plan***.

Task 7: Design the Phase II Marine Reserve Planning Process.

The OPAC 2002 recommendation on marine reserves anticipated that identification of specific sites for marine reserves would be the Phase II process. The exact design of this was left purposely vague in the 2002 report, since much of the process would hinge on Phase I results. It is anticipated that this will be a local-level/regional process, perhaps occurring locally in north, central, and south coast planning forums or in even smaller units, such as counties. Outputs from this task would include the detailed design and boundary determination, with specific goals and objectives for individual marine reserves in each region that are consistent with coastwide policy in the Phase I ***Oregon Marine Reserve Framework Plan***, as applicable to the local situation. It is also anticipated that this process will be supported by the same or similar MR-STAFF group, including local-area scientific and technical staff and advisors. It is expected that this will be a two- to four-year planning effort.

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Task 7.1 Identify a Phase II Marine Reserve Planning Process Subcommittee. Include members of the MRWG, MR-STAFF, MR-STAC, and others deemed valuable additions (MRWG chair).

Task 7.2 Develop a draft Phase II process for review and consideration of the MRWG and eventually the full OPAC. Include the report on potential ecological, social, economic, and other impacts as a section in the published *Oregon Marine Reserve Framework Plan*.

Task 8: OPAC Review and Approval of Oregon Marine Reserve Framework Plan

The MRWG will submit a draft Phase I plan to OPAC for review, public hearings, and approval consideration for transmission to the Governor and relevant state agencies, as per the proposed implementation plan. OPAC will determine the exact process for this review and approval.

Timeline and Sequencing of Tasks

The preliminary timeline for development of the *Oregon Marine Reserve Framework Plan* (Figure 1) assumes that *sufficient* and *timely* funding for all aspects of the planning process will be provided, as per the separately provided budget. Without sufficient funding, the proposed planning process cannot go forward. It is intended that certain preliminary tasks be accomplished between January-June 2007, prior to any significant allocation and expenditure of funds, e.g., all of Task 1, and Tasks 2.1 and 3.1 (these are highlighted in BLUE in the work plan above). Other tasks are expected to be undertaken during a two-year process beginning July 2007 (or whenever funding becomes available).

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	MONTH																																					
WORK PLAN TASK	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J								
1 Getting Started																																						
1.1 Work plan, budget, staff				c	c	c	*																															
1.2 Expand MRWG				*																																		
1.3 Identify MR-Staff Team							*																															
1.4 Identify/appoint MR-STAC					c	c	*																															
2 MR Science Profile/GIS																																						
2.1 Outline/Information Search								*																														
2.2 Draft MR Science Profile/GIS																																						*
3 Issues, Goals, Objectives, Design																																						
3.1 Working Draft 1-MRWG								*																														
3.2 Working Draft 2-Stakeholder															*																							
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4 Candidate MR Regions/Sites																																						
4.1 Identify as part of Tasks 3																																						
5 Approval/Implementation Process																																						
5.1 Audit of existing authorities												*																										
5.2 Implementation Options																																						
6 Assess economic/other impacts																																						
6.1 Develop assessment framework																						*																
6.2 Conduct assessment																																						
7 Design Phase II MR Process																																						
7.1 Identify Phase II Committee																			*																			
7.2 Develop Phase II Process																																						
8 OPAC Public Process/Approval																																						

Notes: c = continuing task

* = completion of task

● = Final Coastwide Marine Reserve Framework Plan

Figure 1. Phase I Preliminary Timeline: Oregon Marine Reserve Framework Plan.