

**ALBERTA LOTIC WETLAND HEALTH ASSESSMENT
FOR LARGE RIVERS**
(Derived by the computer from the Alberta Lotic Wetland Inventory Form)
USER MANUAL
(Current as of 5/16/2023)

The user manual is intended to accompany the *Alberta Lotic Health Assessment For Large River* for the evaluation of riparian areas along large river systems (those with channels wider than 15 m [50 ft]), which is based on data contained in the *Alberta Lotic Wetland Inventory Form*. Another form entitled the *Alberta Lotic Wetland Health Assessment Form For Streams and Small Rivers* (less than 15 m [50 ft] wide).

ACKNOWLEDGEMENTS

Development of these assessment tools has been a collaborative and reiterative process. Many people from many agencies and organizations have contributed greatly their time, effort, funding, and moral support for the creation of these documents, as well as to the general idea of devising a way for people to look critically at wetlands and riparian areas in a systematic and consistent way. Some individuals and the agencies/organizations they represent who have been instrumental in enabling this work are Dan Hinckley, Tim Bozorth, and Jim Roscoe of the USDI Bureau of Land Management in Montana; Karen Rice and Karl Gebhardt of the USDI Bureau of Land Management in Idaho; Bill Haglan of the USDI Fish and Wildlife Service in Montana; Barry Adams and Gerry Ehlert of Alberta Sustainable Resource Development; Lorne Fitch of Alberta Environmental Protection; and Greg Hale and Norine Ambrose of the Alberta Cows and Fish Program.

BACKGROUND INFORMATION

Introduction

Public and private land managers are being asked to improve or maintain lotic (riparian) habitat and stream water quality on lands throughout western North America. Three questions that are generally asked about a wetland site are: 1) What is the potential of the site (e.g., climax or potential natural community)? 2) What plant communities currently occupy the site? and 3) What is the overall health (condition) of the site? For a lotic (flowing water) site, the first two questions can be answered by using the Alberta Lotic Wetland Inventory Form along with a document such as *Classification and Management of Riparian and Wetland Sites of the Alberta Grassland Natural Region and Adjacent Subregions* (Thompson and Hansen 2002), *Classification and Management of Riparian and Wetland Sites of Alberta's Parkland Natural Region and Dry Mixedwood Natural Subregion* (Thompson and Hansen 2003), *Classification and Management of Riparian and Wetland Sites of the Saskatchewan Prairie Ecozone and Parts of Adjacent Subregions* (Thompson and Hansen 2001) or a similar publication written for the region in which you are working.

The *Alberta Lotic Wetland Health Assessment Form* is a method for addressing the third question above: what is the site's overall health (condition)? It provides a site rating useful for setting management priorities and stratifying riparian sites for remedial action or more rigorous analytical attention. It is intended to serve as a first approximation, or coarse filter, by which to identify lotic wetlands in need of closer attention so that managers can more efficiently concentrate effort. We use the term riparian health to mean the ability of a riparian reach (including the riparian area and its channel) to perform certain functions. These functions include sediment trapping, bank building and maintenance, water storage, aquifer recharge, flow energy dissipation, maintenance of biotic diversity, and primary production. Excellent sources of practical ideas and tips on good management of these streamside wetland sites are found in *Caring for the Green Zone* (Adams and Fitch 1995), *Riparian Areas: A User's Guide to Health* (Fitch and Ambrose 2003), and *Riparian Health Assessment for Streams and Small Rivers* (Fitch and others 2001). In Saskatchewan some excellent resources are *Streambank Stewardship, Your Guide to Caring For Riparian Areas in Saskatchewan* (Huel 1998) and *Managing Saskatchewan Wetlands—A Landowner's Guide* (Huel 2000).

Lotic (Riparian) Health

As noted above, the health of a lotic site (a wetland, or riparian area, adjacent to flowing water) may be defined as the ability of that system to perform certain wetland functions. These functions include sediment trapping, bank building and maintenance, water storage, aquifer recharge, flow energy dissipation, maintenance of biotic diversity, and primary biotic production. A site's health rating may also reflect management considerations. For example, although *Cirsium arvense*

(Canada thistle) or *Euphorbia esula* (leafy spurge) may help to trap sediment and provide soil-binding properties, other functions (i.e., productivity and wildlife habitat) will be impaired; and their presence should be a management concern.

No single factor or characteristic of a wetland site can provide a complete picture of either site health or the direction of trend. The lotic health assessment is based on consideration of physical, hydrologic, and vegetation factors. It relies heavily on vegetative characteristics as integrators of factors operating on the landscape. Because they are more visible than soil or hydrologic characteristics, plants may provide early indications of riparian health as well as successional trend. These are reflected not only in the types of plants present, but also by the effectiveness with which the vegetation carries out its wetland functions of stabilizing the soil, trapping sediments, and providing wildlife habitat. Furthermore, the utilization of certain types of vegetation by animals may indicate the current condition of the wetland and may indicate trend toward or away from potential natural community (PNC).

In addition to vegetation factors, an analysis of site health and its susceptibility to degradation must consider physical factors (soils and hydrology) for both ecologic and management reasons. Changes in soil or hydrologic conditions obviously affect functioning of a wetland ecosystem. Moreover, degradation in physical characteristics are often (but not always) more difficult to remedy than vegetative changes. For example, extensive incisement (down-cutting) of a stream channel may lower the water table and thus change site potential from a *Salix lutea/Cornus stolonifera* (yellow willow/red-osier dogwood) habitat type to an *Bromus inermis* (awnless brome) community type or even to an upland (non-riparian) type. Sites experiencing significant hydrologic, edaphic (soil), or climatic changes will likely also have a change in plant community potential.

This assessment method attempts to balance the need for a simple, quick index of health against the reality of an infinite variety of wetland situations. Although this approach will not always work perfectly, we believe in most cases it will yield a usefully accurate rating of riparian health. Some more rigorous methods to determine status of a stream's channel morphology are Dunne and Leopold (1978), Pfankuch (1975), and Rosgen (1996). These relate their ratings to degree of channel degradation, but do not integrate other riparian functions into the rating. Other methods are available for determining condition from perspectives that also include vegetation, such as the USDI Bureau of Land Management (BLM) proper functioning condition (PFC) methodology (1998).

This assessment procedure has been tested in Montana, Idaho, North Dakota, South Dakota, and other surrounding states and western Canada since 1992. Some potential uses for this rating are: 1) for stratifying streams or stream reaches by degree of ecologic dysfunction, 2) for identifying ecologic problems, and 3) when repeated over time, for monitoring to detect functional change. A less direct, but also important, value of an environmental assessment of this kind is its educational potential. By getting land managers to focus on individual riparian functions and ecologic processes, they may come to better understand how the parts work together and are affected by human activities.

This method is not designed for an in-depth and comprehensive analysis of ecologic processes. Such analysis may be warranted on a site and can be done after this evaluation has identified areas of concern. Nor does this approach yield an absolute rating to be used in comparison with streams in other areas or of other types. Comparisons using this rating with streams of different types (Rosgen 1996), different orders (size class), or from outside the immediate locality should be avoided. Appropriate comparisons using this rating can be made between segments of one stream, between neighbouring streams of similar size and type, and between subsequent assessments of the same site.

A single evaluation provides a rating at only one point in time. Due to the range of variation possible on a riparian site, a single evaluation cannot define absolute status of site health or reliably indicate trend (whether the site is improving, degrading, or stable). To monitor trend, health assessments should be repeated in subsequent years during the same time of year. Evaluation should be conducted when most plants can be identified in the field and when hydrologic conditions are most nearly normal (e.g., not during peak spring runoff or immediately after a major storm). Management regime should influence assessment timing. For example, in assessing trend on rotational grazing systems, one should avoid comparing a rating after a season of use one year to a rating another year after a season of rest.

There are some visible changes to riparian area health, which we have no simple way to measure. An obvious and commonly encountered example is excess entrained sediment. This may indicate serious degradation, but we leave it out of the assessment due to difficulty in knowing how much is normal. Instead, we address on-site causes of sediment production: bare ground, banks with poor root mass protection, and human-caused structural damage to the banks. Another potentially serious degrading factor for which we have no simple measurement yet is de-watering of the system by irrigation diversion/pumping and by upper drainage retention dams.

DATA FORM ITEMS

Record ID No. This is the unique identifier allocated to each polygon. This number will be assigned in the office when the form is entered into a database.

Polygon No. Polygon number is a sequential identifier of the actual piece of land being surveyed. This is referenced to the water body code list from the Training Manual.

Administrative Data

A1. Identify what organization is doing the evaluation field work.

A2a. Name of the Funding Agency/Organization (who is providing funding for the work being done/who is being invoiced for the work).

A2b. Name of the Funding Source or Grant (source of funding by the organization providing funding).

A3. Date that the field data was collected: Use the format: month/day/year.

A4. Record the year that the field data was collected.

A5. Observers: Name the evaluators recording the data in the field.

Land ownership may include more than one entity or person, but more than one type of landownership (eg. private and government) should only be selected after considering a number of factors. Factors to consider are the level of detail that the client is looking to extrapolate, the proportion of the area relative to the rest of the polygon and whether it is a typical situation where the multiple types (e.g., crown or non crown land) will not be included. For example, where very minimal Crown bed and shore area exists within the polygon (such as just at the waterline), as part of a primarily privately owned parcel, the private ownership may be listed as the only ownership type.

A6a. Indicate whether the polygon is representative, which requires that stratification has been done to assist in selection of representative sites. Answer “Yes,” “No,” or “Unknown.”

A6b. If A6a was answered “Yes,” select the broadest (largest) scale at which the site is representative. For example, if it is representative (based on stratification) of both the “project area” and the “land holding,” then choose “project area,” to indicate the site represents the larger area. The choices are:

- Representative of a water body (may include multiple management units or land holdings);
- Representative of a management unit within a land holding;
- Representative of a land holding that may contain multiple management units;
- Representative of a project area that may contain multiple land holdings; or
- Unknown.

A6c. Identify how the site was selected or chosen by choosing one of the options. (**ANSWER THIS QUESTION REGARDLESS OF THE ANSWER TO QUESTION A6a.**)

- Random (i.e., some objective random method was used to pick the site location.);
- Selective (i.e., the site location was chosen for some reason; such as sign up lists, demonstration site, project monitoring, or other particular criteria.); (**NOTE:** Representative sampling [A6b] can include sites chosen randomly or selectively); or
- Unknown.

A7a, b. Identify any National, Provincial, or Rural/Urban Municipal, or other Park(s) on which work is being done. If Yes, identify which type of park is established. More than one type may occur.

A7c. Indicate the full **official** name of the National, Provincial, or Rural/Urban park on which work is being done. If Other kind of park, identify the type of park and its established name.

A8a, b. Identify any **other types of protected areas** on which work is being done. If Yes, properly identify the type and name of the protected area that is established. (*Exclude National, Provincial, or Rural/Urban, or other Park(s) recorded in A7.*)

This question includes all areas with regulatory or administrative protection, other than parks, which are covered in A7. There are many types, including:

Conservation Easement are land with a registered easement for the purposes of maintaining conservation value.

Ecological Reserves are areas of Crown Land (Provincial Government), which have the potential to contain representative, rare and fragile landscapes, plants, animals and geological features. The intent is for the preservation of natural ecosystems, habitats and features associated with biodiversity. Public access to ecological reserves is by foot only; public roads and other facilities do not normally exist and will not be developed.

Environmental Reserve generally are those lands that are considered un-developable and may consist of a swamp, gully, ravine, coulee or natural drainage course, flood prone areas, steep slopes or land immediately adjacent to lakes, rivers, stream or other bodies of water. Governed by *The Municipal Government Act (Alberta)*.

Municipal Reserve may also be known, in part, as reserve, park reserve, park or community reserve. Municipal reserves are lands that have been given to the municipality by the developer of a subdivision as part of the subdivision approval process. Governed by *The Municipal Government Act (Alberta)*.

Other types of Protected Area (Designated Nationally, Provincially, or Municipally) such as, Provincial Recreation Areas, Wilderness areas, Natural Areas, Heritage Rangelands, National Historic Sites, and Migratory Bird Sanctuaries.

A9. If this polygon has an association with a Watershed Group/Community Affiliation name the group.

A10. Identify the organizations project name. This may be a internal name not recognized by the Watershed Group or Community Affiliation but a name used to group a series of polygons. Use “Individual” if not a group and not a demo.

A11. Identify if work was done on Private Land? Answer Yes or No. If applicable give the Landowners Name.

A12a-d. Identify if work is being done on Private Land that is rented out? Answer Yes or No. If applicable give Renters Name, their Legal Land Description of residence, and County name, if different from the one where the work is being done.

A13a-d. Public Land is land that is administered by a Federal, Provincial, or Municipal agency. Provincial Public lands are owned by the provincial government and administered under the authority of the Public Lands Act. Identify if work was done on Public Land. Answer “Yes” or “No.” If applicable give Managers Name(s), as well as the Provincial office and their department associated with the management of this land to which work is being done (*Note: for Multi Land Use areas or zones, there may be more than one land manager*).

A14a. Identify if site is a Grazing lease or Grazing reserve on which work is being done. If applicable give Lessees/Group name.

A14c. Identify which Disposition this land falls under and its license number associated with it. i.e., GRL: Grazing Lease, GRP Grazing Permit, GRR Grazing Reserve, FGL Forest Grazing License, CUP Cultivation Permit.

A14d. Give any other grazing name (e.g. Community Pasture) to identify where the work is being done.

A15a, b. A Public Land Use Zone (PLUZ) is an area of public land to which legislative controls apply under authority of the Public Land Administration Regulation to assist in the management of recreational land uses. Each PLUZ may have conditions and regulations that are specific to that land base. **A15a.** Identify if site is within a PLUZ (“Yes” or “No”). **A15b.** Identify the name of the PLUZ.

A16. The several parts of these items identify various ways in which a data record may represent a resampling of a polygon that may have been inventoried again at some other time. The data in this record may have been collected on an area that coincides precisely with an area inventoried at another time and recorded as another record in the database. It may also represent the resampling of only a part of an area previously sampled. This would include the case where this polygon overlaps, but does not precisely and entirely coincide with one inventoried at another time. One other case is where more than one polygon inventoried one year coincides with a single polygon inventoried another year. All of these cases are represented in the database, and all have some value for monitoring purposes, in that they give some information on how the status on a site changes over time. ***This is done in the office with access to the database; field evaluators need not complete these items.***

A16a. Has any part of the area within this polygon been inventoried previously, or subsequently, as represented by another data record in the database? Such other records would logically carry different dates as well as Identification Numbers.

A16b. If A13a is answered “Yes,” then enter the years of any inventories of this exact polygon.

A16c. Does the area extent of this polygon exactly coincide with that of any other inventory represented in the database? In many cases, subsequent inventories only partially overlap spatially.

A16d. If A16c is answered “Yes,” identify those database record ID numbers for other polygons that can be compared as representing exactly the same ground area.

A17a. Even though this polygon is not a re-inventory of the exact same area as any other polygon, does it share at least some common area with one or more polygons inventoried at another time?

A17b. If A17a is answered “Yes,” enter the record ID number(s) of any other polygon(s) sharing common area with this one.

A18a, b. Has a management change been implemented on this polygon or that directly/clearly influences the polygon? Simply answer “Yes,” “No,” or “Unknown.” If applicable, in what year was the management change implemented and describe the management change implemented?

A19. *The primary contact is the person (landowner, land manager, or renter, etc.; include agency name if appropriate) who initiated the contact with the funding organization to have this riparian work conducted. Therefore, if the renter initiated the contact, the land owner would be a secondary contact.*

Location Data

B1. Province in which the field work is being done (i.e., where the polygon is located).

B2. Municipality or Reserve Type: (drop down list in the database). Choose one of the following: **Indian Reserve, Military Reserve, Rural Municipality** (*MD or County, Hamlet, Improvement District [which includes all National Parks]*), *Métis Settlements, Special Areas, Specialized Municipality (5 in the province)* or **Urban Municipality** (*City, Town, Village, Summer Village*). **For further clarification on the three types of Municipalities in Alberta, see insert in the back of the field manual.**

B3a. Indian Reserve Name (drop down list in database)

B3b. Military Reserve Name (drop down list in database)

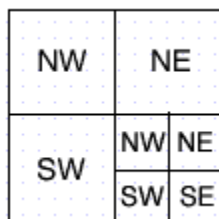
B4a, b. Rural or Specialized Municipality Name (drop down list in database). If applicable, list the Hamlet name in B4b.

B5a-d. The name of the city, town, or village in which the fieldwork is being done. If applicable list the subdivision plan number, block number and lot number of the area to which the work was being done on.

B6a. Name the water body or area on which the field work is being done.

B6b. Identify the side of the polygon that the Assessment is completed for by using North, South, East or West, if assessment includes both sides enter Both.

B7. The location of the polygon is presented as a legal land description (1/4, 1/4 section, 1/4 section, Township, Range, and Meridian) are read from smallest to largest unit.



B8a, b. Identify the Natural Region and Sub-Region in which the field work is being done. Use the Natural Regions and Subregions of Alberta (Alberta Natural Heritage Information Centre [1999]).

B9a. Name the major watershed (e.g. North Saskatchewan River) of which the site being surveyed is a part. List one of the seven major Basins by AESRD: Hay River, Peace/Slave River, Churchill River, North Saskatchewan River, South Saskatchewan River, and Missouri River Watersheds.

B9b. Name the minor watershed (e.g. Battle River) of which the site being surveyed is a part. This is normally subordinate to the major watershed named above in B9a.

B9c. Name the sub-basin in which you are working (e.g. Iron Creek). This is the third level down from the largest (major watershed) (e.g., North Saskatchewan River—Battle River—***Iron Creek***; or South Saskatchewan River—Red Deer River—***Little Red Deer River***). Although you may be working on an even lower level tributary, the sub-basin flows directly into and is subordinate to the minor watershed named above in B9b. ***For example:*** You are doing an inventory on Pekisko Creek—***this creek is not the sub-basin.*** The order should be: South Saskatchewan River—Bow River—Highwood River. If you are doing a site on a Major or Minor Watershed, then the Sub-basin may be the same as the Major or Minor basin, respectively.

B10a-b. Universal Transverse Mercator (UTM) coordinates are recorded for the upper and lower ends of the polygon using Trimble or GPS units in the field.

Enter the UTM coordinates data, including the UTM zone and the identifying waypoint number on the form for each point collected. Save the data in the Trimble /GPS unit for downloading to the computer later.

B10c-d. Identify the Trimble/GPS unit used, and the name or number designator of the waypoints saved for the upper and lower ends of the polygon and for other locations. Describe any comments worth noting about the waypoints (i.e., monument referenced or general location descriptions). Record the projection setting of the unit in use (If using the Trimble unit this will be set during setup in ArcGIS).

B11a-c. Record the name(s), scale, and publication year of the quadrangle map(s) or any other map(s) locating the polygon. Use precisely the name listed on the map sheet. Provision is made for listing two maps in case the polygon crosses between two maps.

B12. Record identifying data for any aerial photos used on this polygon.

Selected Summary Data

C1. Wetland type is a categorical description of the predominant polygon character. Select from the following list of categories that may occur within a lotic system the one that best characterizes the majority of the polygon. Observers will ***select only one category*** as representative of the entire polygon. If significant amounts of other categories are present, indicate this in Vegetation Comments (item D17) or consider dividing the original polygon into two or more polygons.

Category Description

River. Rivers are generally larger than streams. They flow year around, in years of normal precipitation and when significant amounts of water are not being diverted out of them. Those watercourses having bankfull channel widths greater than 15 m (>50 ft) will be classified as rivers for the purpose of this inventory.

Non-riparian (Upland). This designation is for those areas which are included in the inventoried polygon, but which do not support functional wetland vegetation communities. Such areas may be undisturbed inclusions of naturally occurring high ground, or such disturbed high ground as roadways and other elevated sites of human activity.

Other. Describe the water source.

C2. The size (acres/hectares) of polygons large enough to be drawn as enclosed units on 1:20,000 or 1:50,000 scale maps is determined in the office using a planimeter, dot grid, or GIS. For polygons too small to be accurately drawn as enclosed units on the maps, and which are represented by line segments on the map along the drainage bottom, polygon size is calculated using polygon length and average polygon width (items C5 and C7a).

C3a-d. Evaluators may be asked to survey some areas that have not been determined to be wetlands for the purpose of making such a determination. Other polygons include areas supporting non-wetland vegetation types. A Yes answer to C3a indicates that no part of the polygon keys to a riparian habitat type or community type (HT/CT). **Areas classified in item D15 as any vegetation type described in a riparian and/or wetland classification document for the region in which you are working are counted as functional wetlands.** Areas listed as UNCLASSIFIED WETLAND TYPE are also counted as functional wetlands. Other areas are counted as non-wetlands, or uplands. The functional wetland fraction of the polygon area is listed in item C3c in acres and as a percentage of the entire polygon area in item C3d.

C4. Channel length—the length of channel contained within or adjacent to the polygon—is measured by scaling from the map. This data is considered accurate to the nearest 0.16 km (0.1 mi).

C5. In some cases, the polygon record is used to characterize, or represent, a larger portion of a stream system. The length represented by the polygon is given. For example, a 0.8 km (0.5 mi) polygon may be used to represent 6.4 km (4 mi) of a stream. In the case, 0.8 km (0.5 mi) is the channel length of the polygon (item C5), and 6.4 km (4 mi) is entered in item C6.

C6a. Record average width of the polygon, which on smaller streams corresponds to the width of the riparian zone. To determine this width, subtract the width of the non-vegetated stream channel (item F9) from the distance between the two opposite riparian/upland boundaries. In the case of very wide systems where the polygon inventoried does not extend across the full width of the riparian zone (e.g., area with riparian vegetation communities lies outside the polygon), record the average width of the polygon inventoried and make note of the situation in the narrative comments.

C6b. Record the range of width (ft/m), narrowest to widest, of the riparian zone in the polygon.

C6c. Determine whether the assessed riparian area is along a stream or small river (**channel** is less than 15 m wide [less than 50 ft]) or along a large river (**channel** is greater than 15 m wide [greater than 50 ft]). This question is used by the computer to determine whether to derive a lotic wetland health assessment for streams and small rivers, or to derive one for large rivers. On the field form, write in either **Stream/Small River** or **Large River** to answer this question.

C7. List the riparian habitat type(s) and/or community type(s) found in the polygon using a manual for identifying types in the region in which you are working, such as *Classification and Management of Riparian and Wetland Sites of the Alberta Grassland Natural Region and Adjacent Subregions* (Thompson and Hansen 2002), *Classification and Management of Riparian and Wetland Sites of Alberta's Parkland Natural Region and Dry Mixedwood Natural Subregion* (Thompson and Hansen 2003), *Classification and Management of Riparian and Wetland Sites of the Saskatchewan Prairie Ecozone and Parts of Adjacent Subregions* (Thompson and Hansen 2001) or the applicable Sustainable Resource Development (SRD) Guide for the natural sub-region in which you are working. If the habitat type cannot be determined for a portion of the polygon, then list the appropriate community type(s) of that portion. If neither the habitat type nor community type can be determined for any portion of the polygon (or in areas where the habitat and community types have not been named and described), list the area in question as unclassified wetland type and give the dominant species present. Indicate with the appropriate abbreviation if these are habitat types (HT), community types (CT), or dominance types (DT), for example, SALILUT/CORNSTO HT (*Salix lutea/Cornus stolonifera* [yellow willow/red-osier dogwood] Habitat Type). For each type listed, estimate the percent of the polygon represented. If known, record the successional stage (i.e., early seral, mid-seral, late seral, and climax), or give other comments about the type. As a minimum, list all types that cover 5% or more of the polygon. The total must approximate 100%. Slight deviations due to use of class codes or to omission of types covering less than 5% of the polygon are allowed. **NOTE:** For any area designated as an unclassified wetland type, it is important to list any species present that can indicate the wetness or dryness of the site.

The things listed in item D15 (HTs, CTs, and other coverages) should account for the entire polygon area. These values are used in analyses calculations that must account for the whole polygon. The list of nonriparian vegetation types is shown below, but it is somewhat dynamic, so that if others are encountered, they can be added. These other “types” are important to understand what is happening on the polygon.

- **Artificial Open Water** (regardless of depth, this refers to open water on the polygon that is artificially created/constructed [i.e., dugout]);
- **Building Complex;**
- **Cropland;**
- **Gravel Surface** (human constructed);
- **Hayfield** (refers to a purposefully converted riparian area into a hayfield [seeded] and insufficient native species exist to help identify HT/CT type vs. land use type);

- **Lawn** (use Lawn instead of POAPRAT CT when the site has been purposefully/physically manipulated due to seeding or sodding);
- **Natural Open Water** (refers to open water in the polygon that does not have emergent vegetation and is less than 2 m {6.6 ft} deep);
- **Paved Surface**;
- **Shelterbelt** (refers to trees and/or shrubs planted as a barrier to reduce wind speed and to protect crops, livestock, buildings, work areas, and roads from wind and snow);
- **Unvegetated Mine Tailings**;
- **Upland Artificial** (refers to an upland area artificially created within the riparian area being assessed [i.e., spoil piles, overburden]. Do not include built-up roads/surfaces—these would still be included as paved surface or gravel surface.);
- **Upland Natural** (refers to naturally occurring areas within the riparian area being assessed), and;
- **Unclassified Wetland Type UNC** (as per CF updated protocol [2012] included with Habitat Classification Keys in CF manual).

NOTE #1: The term “Unclassified Wetland Type” signifies a natural vegetation that does not yield a name when put through an HT/CT key, but which can be described by species dominance in upper and lower stories. You normally should only need to use “Unclassified Wetland Type” when working in an area lacking a classification.

NOTE #2: The following describes how to account for 100% of polygon in open water situations.

- Natural situation—the open water is a small pond typically **greater than 2 m [6.0 ft] deep and plants do not emerge above the water**—then do not include in the polygon.
- If there is open water that is less than 2 m [6.0 ft] deep and there is no emergent veg and is natural—call this “**Natural Open Water**” and include in the HT/CT.
- If the open water is artificially created regardless of depth, then call this “Artificial Open Water” and include in the HT/CT section. Describe in the comments. The entire area is included in the polygon as human-caused alteration.
- If unnatural upland areas (spoil piles, overburden, etc.) are created within the riparian area due to the deposit of material from excavated areas, call this **Upland Artificial**. The entire **Upland Artificial** area (i.e., spoil pile) is in the polygon regardless of height. *(By including the Upland Artificial area, we can account for a plant community or bare ground on the slopes and on top of the pile as well as alterations on the slopes and on top of the pile because it is still within the polygon boundary land area.)*

FACTORS FOR ASSESSING LOTIC WETLAND HEALTH FOR LARGE RIVERS

NOTE: In the following instructions the corresponding *Lotic Wetland Inventory Form* item numbers (from which the health is derived) are shown in parentheses. Details of how these source data items are collected are located in the *Lotic Wetland Inventory Form User Guide*. For polygons contained in the Lotic Wetland database, all calculations are done by the computer. Some factors on the evaluation may not apply on all sites. For example, sites without potential for woody species are not rated for tree and shrub regeneration or utilization.

1. Cottonwood and Balsam Poplar Regeneration (D5c). This item is assessed differently on either side of the Red Deer River valley. For areas south of and including the Red Deer River Valley, do not count asexual regeneration from root sprouts. In this southern area of the province, count only reproduction from seed. This is because these trees are primarily riverine species that pioneer on recent alluvium from seed, and root sprouts do not serve well to maintain populations. In areas north of the Red Deer River Valley (and some areas farther south in higher precipitation zones, such as the foothills west of Highway 2), count any mode of reproduction for this group of trees, because in these cooler/moister zones cottonwoods and balsam poplar populations are not dependent on seed deposited on riverine alluvium. (**NOTE:** In this item do not include the species *Populus tremuloides* [aspen], which is included in the next item below.)

Reproduction success can be determined by estimating the seedling and sapling cover expressed as percentage of the overall cover of the species on the site. (**NOTE:** If no potential for cottonwood or balsam poplar exists on the polygon (such as when it is on the outside of a long meander curve where depositional material is not expected, or there are no such trees on similar site positions nearby) replace both Actual Score and Possible Score with NA. Count plants installed by human planting, if they have survived at least one full year after planting. To be successful the new plants need to have at least one complete growing season on the site. Many new plants do not survive the first growing season. **NOTE:** Use judgement and caution in counting occasional seedlings in precarious positions where they have little potential for survival due to natural physical jeopardy (e.g., at water's edge along outside curve).

Scoring: (If the site has no potential for cottonwood and/or balsam poplar, replace both Actual Score and Possible Score with NA. If the evaluator is not fairly certain potential exists for cottonwood and/or balsam poplar, then enter NC and explain in the comment field below.)

6 = More than 15% of the cottonwood and/or balsam poplar cover is seedlings and/or saplings.

4 = 5% to 15% of the cottonwood and/or balsam poplar cover is seedlings and/or saplings.

2 = Up to 5% of the cottonwood and/or balsam poplar cover is seedlings and/or saplings.

0 = None (the site has the potential for cottonwood and/or balsam poplar cover, but seedlings and/or saplings are absent from the site).

2. Regeneration of Other Native Tree Species (D5d). As succession progresses on a riparian site, the pioneer trees and shrub communities are replaced by later seral communities (if river dynamics allow enough time). If the site is not de-watered or otherwise disturbed, this progression is often to communities dominated by other native tree species. Depending upon dynamics of the system (how fast the channel migrates laterally), the potential may exist for equilibrium at different locations along the river between younger (those dominated by young trees and willows) communities and older communities with aging cottonwoods/poplars and later seral species such as *Populus tremuloides* (aspen), *Picea glauca* (white spruce), *Acer negundo* (Manitoba maple), and *Fraxinus pennsylvanica* (green ash). **NOTE:** Seedlings and saplings of these species include individuals which are less than 7.5 cm (3 in) in dbh. In situations where all plant communities are in an early successional stage and where no later successional species are yet expected (such as a young point bar or a newly formed island), replace both Actual Score and Possible Score with NA.

The health of a population can be based on current regeneration success without having to determine the exact potential distribution between cottonwoods/poplars and the other tree species on a site. This regeneration success can be determined from the seedling and sapling canopy cover expressed as a percentage of the overall cover of the group of tree species on the site other than cottonwoods/poplars. Count plants installed by human planting if they have survived at least one complete growing season on the site. Many new plants do not survive the first growing season.

Scoring: (If the site has no potential for other native tree species, replace both Actual Score and Possible Score with NA. If the evaluator is not fairly certain potential exists for other native tree species, then enter NC and explain in the comment field below.)

3 = More than 5% of the other (non-cottonwood/balsam poplar) tree cover is seedlings and/or saplings.

2 = 1% to 5% of the other (non-cottonwood/balsam poplar) tree cover is seedlings and/or saplings.

1 = Less than 1% of the other (non-cottonwood/balsam poplar) tree cover is seedlings and/or saplings.

0 = None (the site has the potential for native trees other than cottonwood and/or balsam poplar, but seedlings and/or saplings of these species are absent from the site).

3. Regeneration of Preferred Shrub Species (D6c). (This item is skipped if the site lacks potential for shrubs.) Not all riparian areas can support shrubs. However, on those sites where such species do belong, they play important roles. The root systems of woody species are excellent bank stabilisers, while their spreading canopies provide protection to soil, water, wildlife, and livestock. Young age classes of woody species are important for the continued presence of woody communities not only at a given point in time but into the future. Woody species potential can be determined by using a key to site type (Thompson and Hansen 2001, 2002, 2003, etc.). On severely disturbed sites, the evaluator should seek clues to potential by observing nearby sites with similar landscape position. (**NOTE:** Vegetation potential is commonly underestimated on sites with a long history of disturbance.)

The following species are excluded from the evaluation (those not listed are considered preferred):

- *Artemisia cana* (silver sagebrush), including subsp. *cana* and *viscidula*;
- *Caragana* species (caragana)
- *Crataegus* species (hawthorn);
- *Elaeagnus angustifolia* (Russian olive);
- *Elaeagnus commutata* (silverberry/wolf willow);
- *Potentilla fruticosa* (shrubby cinquefoil);
- *Rhamnus catharticus* (European/common buckthorn);
- *Rosa* species (rose);
- *Sarcobatus vermiculatus* (greasewood);
- *Symphoricarpos* species (buckbrush/snowberry);
- *Tamarix* species (salt cedar); and
- Non-native species.

These are species that may reflect long-term disturbance on a site, that are generally less palatable to browsers, and that tend to increase under long-term moderate-to-intense grazing pressure; **AND** for which there is rarely any problem in maintaining presence on site. Examples of the latter include *Artemisia cana* (silver sagebrush) and *Sarcobatus vermiculatus* (greasewood). Both are considered climax species in many riparian situations and rarely have any problem maintaining a presence on a site. Only under extreme long-term grazing pressures will these species be eliminated from a site. *Elaeagnus angustifolia* (Russian olive), *Caragana* species (caragana), *Rhamnus catharticus* [European/common buckthorn], and *Tamarix* species [salt cedar] are considered especially aggressive, undesirable exotic plants.

The main reason for excluding these plants is they are far more abundant on many sites than are species of greater concern (e.g., *Salix* species [willows], *Cornus stolonifera* [red-osier dogwood], *Amelanchier alnifolia* [Saskatoon serviceberry], and many other taller native riparian species), and they may mask the ecological significance of a small amount of a species of greater concern. **FOR EXAMPLE:** A polygon may have *Symphoricarpos occidentalis* (buckbrush/snowberry) with 30% canopy cover showing young plants for replacement of older ones, while also having a trace of *Salix exigua* (sandbar willow) present, but represented only by older mature individuals. We feel that the failure of the willow to regenerate (even though there is only a small amount) is very important in the health evaluation, but by including the buckbrush/snowberry and willow together on this polygon, the condition of the willow would be hidden (overwhelmed by the larger amount of buckbrush/snowberry).

For shrubs in general, seedlings and saplings can be distinguished from mature plants as follows. For those species having a mature height generally over 1.8 m (6.0 ft), seedlings and saplings are those individuals less than 1.8 m (6.0 ft) tall. For species normally not exceeding 1.8 m (6.0 ft), seedlings and saplings are those individuals less than 0.45 m (1.5 ft) tall or which lack reproductive structures and the relative stature to suggest maturity. Count plants installed by human planting if they have survived at least one full year after planting. To be successfully the new plants need to have at least one complete growing season on the site. Many new plants do not survive the first growing season. (**NOTE:** Evaluators should take care not to confuse short stature resulting from intense browsing with that due to young plants.)

The computer evaluates this item on the basis of data recorded on the *Lotic Wetland Inventory Form* for the fraction of tree and shrub species cover on the site that is in the young age classes.

Scoring: (If the site has no potential for shrubs [except for the species listed above to be excluded], the computer automatically replaces both the Actual Score and Possible Score with zero.)

6 = More than 15% of the preferred shrub species cover is seedlings and/or saplings.

4 = 5% to 15% of the preferred shrub species cover is seedlings and/or saplings.

2 = Less than 5% of the preferred shrub species cover is seedlings and/or saplings.

0 = None (the site has the potential for preferred shrub species, but seedlings and/or saplings of preferred shrubs are absent from the site).

4. Standing Decadent and Dead Woody Material (D2b and D6c). (Skip this item if the site lacks trees or shrubs; for example, the site is a herbaceous wet meadow or cattail marsh.) The amount of decadent and dead woody material on a site can be an indicator of the overall health of a riparian area. Large amounts of decadent and dead woody material may indicate a reduced flow of water through the stream (de-watering) due to either human or natural causes. De-watering of a site, if severe enough, may change the site vegetation potential from riparian species to upland species. In addition, decadent and dead woody material may indicate severe stress from over browsing. Finally, large amounts of decadent and dead woody material may indicate climatic impacts, disease and insect damage. For instance, severe winters may cause extreme die back of trees and shrubs, and cyclic insect infestations may kill individuals in a stand. In all these cases, a high percentage of dead and decadent woody material reflects degraded vegetative health, which can lead to reduced streambank integrity, channel incisement, and excessive lateral cutting, besides reducing production and other wildlife values.

The most common usage of the term *decadent* may be for over mature trees past their prime and which may be dying, but we use the term in a broader sense. We count decadent plants, both trees and shrubs, as those with 30% or more dead wood in the upper canopy. In this item, scores are based on the percentage of total woody canopy cover which is decadent or dead, not on how much of the total polygon canopy cover consists of dead and decadent woody material. Only decadent and dead standing material is included, not that which is lying on the ground. The observer is to ignore (not count) decadence in poplars or cottonwoods which are decadent *due to old age* (rough and furrowed bark extends substantially up into the crowns of the trees) (species: *Populus deltoides* [plains cottonwood], *P. angustifolia* [narrow-leaf cottonwood], and *P. balsamifera* [balsam poplar]), because cottonwoods/poplars are early seral species and naturally die off in the absence of disturbance to yield the site to later seral species. The observer is to consider (count) decadence in these species if apparently caused by de-watering, browse stress, climatic influences, or parasitic infestation (insects/disease). The observer should comment on conflicting or confounding indicators, and/or if the cause of decadence is simply unknown (*but not due to old age*). Do not count plants installed by human planting, that are less than one year old, as dead/decadent.

Scoring: (If the site has no potential for trees or shrubs [except for the species listed above to be excluded], the computer automatically replaces both the Actual Score and Possible Score with zero.)

3 = Less than 5% of the total canopy cover of woody species is decadent and/or dead.

2 = 5% to 25% of the total canopy cover of woody species is decadent and/or dead.

1 = 25% to 50% of the total canopy cover of woody species is decadent and/or dead.

0 = More than 50% of the total canopy cover of woody species is decadent and/or dead.

5a. Browse Utilization of Available Preferred Trees and Shrubs (D5a and D6c). (Skip this item if the site lacks trees or shrubs; for example, the site is a herbaceous wet meadow or cattail marsh, or all woody plants have already been removed.) Livestock and/or wildlife browse many riparian woody species. Excessive browsing can eliminate these important plants from the community and result in their replacement by undesirable invaders. With excessive browsing, the plant loses vigour, is prevented from flowering, or is killed. Utilization in small amounts is normal and not a health concern, but concern increases with greater browse intensity.

The following species are excluded from the evaluation:

- *Artemisia cana* (silver sagebrush), including subsp. *cana* and *viscidula*;
- *Caragana* species (caragana)
- *Crataegus* species (hawthorn);
- *Elaeagnus angustifolia* (Russian olive);
- *Elaeagnus commutata* (silverberry/wolf willow);
- *Potentilla fruticosa* (shrubby cinquefoil);

- *Rhamnus catharticus* (European/common buckthorn);
- *Rosa* species (rose);
- *Sarcobatus vermiculatus* (greasewood);
- *Symphoricarpos* species (buckbrush/snowberry);
- *Tamarix* species (salt cedar); and
- Non-native species.

These are species that may reflect long-term disturbance on a site, that are generally less palatable to browsers, and that tend to increase under long-term moderate-to-intense grazing pressure; **AND** for which there is rarely any problem in maintaining presence on site. Examples of the latter include *Artemisia cana* (silver sagebrush) and *Sarcobatus vermiculatus* (greasewood). Both are considered climax species in many riparian situations and rarely have any problem maintaining a presence on a site. Only under extreme long-term grazing pressures will these species be eliminated from a site. *Elaeagnus angustifolia* (Russian olive), *Caragana* species (caragana), *Rhamnus catharticus* [European/common buckthorn], and *Tamarix* species [salt cedar] are considered especially aggressive, undesirable exotic plants.

As discussed above, the main reason for excluding these plants is they are far more abundant on many sites than are species of greater concern (e.g., *Salix* species [willows], *Cornus stolonifera* [red-osier dogwood], *Amelanchier alnifolia* [Saskatoon serviceberry], and many other taller native riparian species), and they may mask the ecological significance of a small amount of a species of greater concern. **FOR EXAMPLE:** A polygon may have *Symphoricarpos occidentalis* (buckbrush/snowberry) with 30% canopy cover showing young plants for replacement of older ones, while also having a trace of *Salix exigua* (sandbar willow) present, but represented only by older mature individuals. We feel that the failure of the willow to regenerate (even though there is only a small amount) is very important in the health evaluation, but by including the buckbrush/snowberry and willow together on this polygon, the condition of the willow would be hidden (overwhelmed by the larger amount of buckbrush/snowberry).

Consider as available all tree and shrub plants to which animals may gain access and that they can reach. For tree species, this means mostly just seedling and sapling age classes. When estimating degree of utilization, count browsed second year and older leaders on representative plants of woody species normally browsed by ungulates. Do not count current year's use, because this would not accurately reflect actual use when more browsing can occur later in the season. Browsing of second year or older material affects the overall health of the plant and continual high use will affect the ability of the plant to maintain itself on the site. Determine percentage by comparing the number of leaders browsed or utilized with the total number of leaders available (those within animal reach) on a representative sample (at least three plants) of each tree and shrub species present. Do not count utilization on dead plants, unless it is clear that death resulted from over-grazing. **NOTE:** If a shrub is entirely mushroom/umbrella shaped by long-term intense browse or rubbing, count browse utilization of it as heavy.

Scoring: (Consider all shrubs within animal reach and seedlings and saplings of tree species. If the site has no potential for trees or shrubs [except for the species listed above to be excluded], the computer automatically replaces both the Actual Score and Possible Score with zero.)

3 = None (0% to 5% of available second year and older leaders of preferred species are browsed).

2 = Light (5% to 25% of available second year and older leaders of preferred species are browsed).

1 = Moderate (25% to 50% of available second year and older leaders of preferred species are browsed).

0 = Heavy (More than 50% of available second year and older leaders of preferred species are browsed).

5b. Live Woody Vegetation Removal by Other Than Browsing (D6e). Excessive cutting or removing parts of plants or whole plants by agents other than browsing animals (e.g., human clearing, cutting, beaver activity, etc.) can result in many of the same negative effects to the community that are caused by excessive browsing. However, other effects from this kind of removal are direct and immediate, including reduction of physical community structure and wildlife habitat values. **Do not include natural phenomena such as natural fire, insect infestation, etc. in this evaluation.**

Removal of woody vegetation may occur at once (a logging operation), or it may be cumulative over time (annual firewood cutting or beaver activity). **This question is not so much to assess long-term incremental harvest, as it is to assess the extent that the stand is lacking vegetation that would otherwise be there today.** Give credit for re-growth. Consider how much the removal of a tree many years ago may have now been mitigated with young replacements.

Invasive woody species or genera are excluded from consideration because these are aggressive, invasive exotic plants that should be removed. They are *Berberis vulgaris* (common barberry), *Caragana arborescens* (common caragana), *Clematis tangutica* (yellow clematis), *Elaeagnus angustifolia* (Russian olive), *Elaeagnus umbellata* (Autumn olive), *Rhamnus cathartica* (European/common buckthorn), and *Tamarix* species (salt cedar).

Determine the extent to which woody vegetation (trees and shrubs) is lacking due to being physically removed (i.e., cut by beaver, cut by humans, mowed, trimmed, logged, or otherwise removed from their growing position). The timeframe is less important than the ecological effect. Time to recover from this kind of damage can vary widely with site characteristics. The objective is to measure the extent of any damage remaining **today** to the vegetation structure resulting from woody removal. We expect that the woody community will recover over time (re-grow), just as an eroding bank will heal with re-growing plant roots. **This question simply asks how much woody material is still missing from what should be on the site?** The amount of time since removal doesn't really matter, if re-growth has been allowed to progress. If 20 years after logging, the site has a stand of sapling spruce trees, then it should get partial re-growth credit, but not full credit, since the trees still lack much of their potential habitat and ecological value. (**NOTE:** In general, the more recent the removal, the more entirely it should be fully counted; and conversely, the older the removal, the more likely it will have been mitigated by re-growth.)

This question is really looking at volume (three dimensions) and not canopy cover (two dimensions). For example, if an old growth spruce tree is removed, a number of new seedlings/saplings may become established and could soon achieve the same canopy cover as the old tree had. However, the value of the old tree to wildlife and overall habitat values is far greater than that of the seedling/saplings. It will take a very long time before the seedlings/saplings can grow to replace all the lost habitat values that were provided by the tall old tree. On the other hand, shrubs, such as willows, grow faster and may replace the volume of removed plants in a much shorter time. **Answer this question by estimating the percent of woody material that is missing from the site due to having been removed by human action or beaver (active or inactive) or other methods regardless of timeframe. Select a range category from the choices given that best represents the percent of missing woody material.**

Note 1: If the polygon does not have the ability to support (potential for) any trees and shrubs (example: prairie/saline conditions) and there is no evidence that it ever had any, **record as NA** and record the reason in D6g.

Note 2: If the polygon has potential for trees and shrubs but they are not present, look for evidence (i.e. stumps or cut woody plants within the polygon or other indicators [e.g. adjacent lands, across the fence, surrounding landscape, personal communication, historical imagery]).

Note 3: When insufficient data/evidence is available to make a call, **record as NC** and record the reason in D6g. Also used for old polygons when data was not collected.

Scoring: (If the polygon does not have the ability to support [potential for] any trees and shrubs and there is no evidence that it ever had any, replace both Actual Score and Possible Score with **NA**. When insufficient data/evidence is available to make a call, replace both Actual Score and Possible Score with **NC**.)

3 = None (0% to 5% of live woody vegetation expected on the site is lacking due to cutting).

2 = Light (5% to 25% of live woody vegetation expected on the site is lacking due to cutting).

1 = Moderate (25% to 50% of live woody vegetation expected on the site is lacking due to cutting).

0 = Heavy (More than 50% of live woody vegetation expected on the site is lacking due to cutting).

6. Total Canopy Cover of Woody Species (D11). Woody species play a critical role in river bank integrity. Natural river banks are protected by large bank rock (e.g., boulders and cobbles) and by woody vegetation. On floodplains comprised primarily of fine textured materials—which are typical of many western rivers—river banks are protected only by the woody vegetation. In these cases, it is critically important to manage for healthy woody vegetation. Woody vegetation also traps sediment, helps to reduce velocity of flood waters, protects the soil from extreme temperatures, and provides wildlife habitat. **NOTE:** Unlike other items dealing with woody plants, this item focuses on how much of the total polygon is covered by woody plants.

Scoring:

- 3** = More than 50% of the total area is occupied by all woody species.
- 2** = 25% to 50% of the total area is occupied by all woody species.
- 1** = 5% to 25% of the total area is occupied by all woody species.
- 0** = Less than 5% of the total area is occupied by all woody species.

7. Invasive Plant Species (Weeds) (D13c). Invasive plants (weeds) are alien species whose introduction does or is likely to cause economic or environmental harm. Whether the disturbance that allowed their establishment is natural or human-caused, weed presence indicates a degrading ecosystem. While some of these species may contribute to some riparian functions, their negative impacts reduce overall site health. This item assesses the degree and extent to which the site is infested by invasive plants. The severity of the problem is a function of the density/distribution (pattern of occurrence), as well as canopy cover (abundance) of the weeds. In determining the health score, all invasive plant species are considered collectively, not individually. A weed list should be used that is standard for the locality and that indicates which species are being considered (i.e., *Invasive Weed and Disturbance-caused Undesirable Plant List* [Cows and Fish 2002]).

The site's health rating on this item combines two factors: weed density/distribution class and total canopy cover. A perfect score of 6 out of 6 points can only be achieved if the site is weed free. A score of 4 out of the 6 points means the weed problem is just beginning (i.e., very few weeds and small total canopy cover [less than 1%]). A moderate weed problem gets 2 out of 6 points. It has a moderately dense weed plant distribution (a class between 4 and 7) and moderate total weed canopy cover (between 1% and 15%). A site scores 0 points if the density/distribution is in class 8 or higher, or if the total weed canopy cover is 15% or more.

NOTE: For field determination of vegetative cover include ***all rooted plant material*** (live or dead). Do not include fallen wood or other plant litter. Do not consider the polygon area covered by water (such as between emergent plants).

7a. Total Canopy Cover of Invasive Plant Species (Weeds). This item rates the total percentage of polygon area occupied by the combined canopy cover of all species of invasive plants.

Scoring:

- 3** = No invasive plant species (weeds) on the site.
- 2** = Invasive plants present with total canopy cover less than 1% of the polygon area.
- 1** = Invasive plants present with total canopy cover between 1% and 15% of the polygon area.
- 0** = Invasive plants present with total canopy cover more than 15% of the polygon area.

7b. Density Distribution of Invasive Plant Species (Weeds). This item rates the polygon for weed plant density/distribution based on categories illustrated in Item D13 of the Lotic Wetland Inventory.

Scoring:

- 3** = No invasive plant species (weeds) on the site.
- 2** = Invasive plants present with density/distribution in categories 1, 2, or 3.
- 1** = Invasive plants present with density/distribution in categories 4, 5, 6, or 7.
- 0** = Invasive plants present with density/distribution in categories 8, or higher.

NOTE: Prior to the 2001 season, the health score for weed infestation was assessed from a single numerical value that does not represent weed canopy cover, but instead represents the fraction of the polygon area on which weeds had a well established population of individuals (i.e., the area infested).

8. Disturbance-Increaser Undesirable Herbaceous Species (D14b). A large cover of disturbance-increaser undesirable herbaceous species, native or exotic, indicates displacement from the potential natural community (PNC) and a reduction in riparian health. These species generally are less productive, have shallow roots, and poorly perform most riparian functions. They usually result from some disturbance, which removes more desirable species. Invasive plant species considered in the previous item are not reconsidered. As in the previous item, the evaluator should state the list of species considered. A partial list of undesirable herbaceous species appropriate for use in Alberta follows. A list should be used that is standard for the locality and that indicates which species are being considered (i.e., *Invasive Weed and Disturbance-caused Undesirable Plant List* [Cows and Fish 2001]). The evaluator should list any additional species included.

Antennaria species (pussy-toes)
Brassicaceae (mustards)
Bromus inermis (awnless brome)
Fragaria species (strawberries)

Hordeum jubatum (foxtail barley)
Plantago species (plantains)
Poa pratensis (Kentucky bluegrass)

Potentilla anserina (silverweed)
Taraxacum species (dandelion)
Trifolium species (clovers)

NOTE: For field determination of vegetative cover include **all rooted plant material** (live or dead). Do not include fallen wood or other plant litter. Do not consider the polygon area covered by water (such as between emergent plants).

Scoring:

- 3** = Less than 5% of the site covered by disturbance-increaser undesirable herbaceous species.
- 2** = 5% to 25% of the site covered by disturbance-increaser undesirable herbaceous species.
- 1** = 25% to 50% of the site covered by disturbance-increaser undesirable herbaceous species.
- 0** = More than 50% of the site covered by disturbance-increaser undesirable herbaceous species.

9. River Bank Root Mass Protection (F7). Vegetation along river banks performs the primary physical functions of stabilizing the soil with a binding root mass and of filtering sediments from overland flow. Few studies have documented depth and extent of root systems of plant species found in wetlands, however flow energies commonly experienced by rivers are effectively resisted only by the deep and extensive roots provided by tree and shrub species. Natural rivers typically move dynamically across their valley bottom. The vegetation roots serve to slow this lateral movement to a rate that allows normal floodplain ecosystem function, such as development of mid and later seral vegetation communities for habitat values. For this reason there needs to be good root mass protection well back from the immediate toe of the current bank position.

In situations where you are assessing a high, cut bank (usually on an outside bend), the top may be upland, but the bottom is riparian. Do not assess the area that is non-riparian. In cases of tall, nearly vertical cut banks, assess the bottom portion that comes in contact with floodwaters. Omit from consideration those areas where the bank is comprised of bedrock, since these neither provide binding root mass, nor erode at a rate that is normally a concern. In assessing root mass protection along a river, consider a band that extends back approximately 15 m (50 ft) from the bank top. (This is a rule of thumb for guidance that requires only estimated measurements.) The bank top is that point where the upper bank levels off to the relatively flat surface of a floodplain or terrace. This question is most critically assessed along straight reaches and outside curves, therefore do not get too concerned with trying to find the exact location of the bank top along inside curve point bar positions.

NOTE: Rip-rap does not substitute for, act as, or preclude the need for deep, binding root mass.

Since the kind and amount of deep, binding roots needed to anchor a bank is dependent on size of the stream, use the following table as a general guide to determine width of a band along the banks to assess for deep, binding roots. This is a rule of thumb for guidance that requires only estimated measurements.

Stream Size (Bankfull Channel Width)	Width of Band to Assess for Deep, Binding Roots
Rivers (Larger Than 15 m [50 ft])	15 m (50 ft)
Small Rivers and Large Streams (Approx. 5-15 m [16-49 ft])	5 m (16 ft)
Small Streams (Up To Approx. 5 m [16 ft])	2 m (6 ft)

Scoring:

- 6** = More than 85% of the river bank has a deep, binding root mass.
- 4** = 65% to 85% of the river bank has a deep, binding root mass.
- 2** = 35% to 65% of the river bank has a deep, binding root mass.
- 0** = Less than 35% of the river bank has a deep, binding root mass.

10. Human-Caused Bare Ground (F15c). Bare ground is soil not covered by plants, litter or duff, downed wood, or rocks larger than 6 cm (2.5 in). Hardened, impervious surfaces (e.g., asphalt, concrete, etc.) are not bare ground—these do not erode nor allow weeds sites to invade. Bare ground caused by human activity indicates a deterioration of riparian health.

Sediment deposits and other natural bare ground are excluded as normal or probably beyond immediate management control. Human land uses causing bare ground include livestock grazing, recreation, roads, and industrial activities. The evaluator should consider the causes of all bare ground observed and estimate the fraction that is human-caused.

River channels that go dry during the growing season can create problems for polygon delineation. Some river channels remain unvegetated after the water is gone. On most rivers the area of the channel bottom is excluded from the polygon. (**NOTE:** *The whole channel width extends from right bankfull stage to left bankfull stage; however we need to include the lower banks in all polygons, therefore consider for exclusion ONLY the relatively flat and lowest area of the channel—the bottom.*) This allows data to be collected on the riparian area while excluding the aquatic zone, or open water, of the river. The aquatic zone is the area covered by water and lacking persistent emergent vegetation. Persistent emergent vegetation consists of perennial wetland species that normally remain standing at least until the beginning of next growing season, e.g., *Typha* species (cattails), *Scirpus* species (bulrushes), *Carex* species (sedges), and other perennial graminoids.

In many systems, large portions of the channel bottom may become exposed due to seasonal irrigation use, hydroelectric generation, and natural seasonal changes such as are found in many prairie ecosystems. In these cases, especially along prairie rivers, the channel bottom may have varying amounts of herbaceous vegetation, and the channel area is **included** in the polygon as area to be inventoried. Typically, these are the pooled channel river type that has scour pools scattered along the length, interspersed with reaches of grass, bulrush, or sedge-covered channel bottom. If over half (>50%) the channel bottom area has a canopy cover of persistent vegetation cover (perennial species), taken over the entire length of the polygon as a whole, then the entire channel qualifies for inclusion within the inventoried polygon area. If you are in doubt whether to include the channel bottom in the polygon, then leave it out, but be sure to indicate this in the comment section. This is important so that future assessments of the polygon will be looking at the same area of land.

Scoring:

- 6** = Less than 1% of the polygon is human-caused bare ground.
- 4** = 1% to 5% of the polygon is human-caused bare ground.
- 2** = 5% to 15% of the polygon is human-caused bare ground.
- 0** = More than 15% of the polygon is human-caused bare ground.

NOTE: Questions 11 and 12 below generally must be answered in the office using maps and other data.

11. Removal or Addition of Water from/to the River System (F24). Proper functioning of any riparian ecosystem depends, by definition, upon the system supply of water. The degree to which this lifeblood is artificially manipulated by removal or addition from/to the system is directly reflected in a reduction of riparian functions (e.g., wetland plant community maintenance, channel bank stability, wildlife habitat, overall system primary production). The extent of this alteration of the system can be estimated by determining the fraction of the average river flow, which is removed or added during the critical growing season each year. This determination can be based upon gauging station records as they relate to historic flow records established before construction of diversions. This question only deals with water volume changes. The question of dams controlling the timing of peak runoff is taken care of in the next question.

Scoring:

- 9** = Less than 10% of average river flow volume during the critical growing season is changed.
- 6** = 10% to 25% of average river flow volume during the critical growing season is changed.
- 3** = 25% to 50% of average river flow volume during the critical growing season is changed.
- 0** = More than 50% of average river flow volume during the critical growing season is changed.

12. Control of Flood Peak and Timing by Upstream Dam(s) (F25). Natural riverine ecosystems adapt to, and depend upon, the volume and timing of annual peak flows, which are determined by the watershed water yield and variability of the local climate. Humans have installed dams on many rivers for agricultural and industrial purposes and to mitigate the damages caused by the natural flooding to human development on the floodplain. The dams affect the functional health of the natural system. In this context, the health of the river system relates directly to the fraction of the watershed which remains undammed. Thus, this item includes all tributaries which flow into the river upstream of the reach being assessed.

Scoring:

- 9 = Less than 10% of the watershed upstream of the reach is controlled by dams.
- 6 = 10% to 25% of the watershed upstream of the reach is controlled by dams.
- 3 = 25% to 50% of the watershed upstream of the reach is controlled by dams.
- 0 = More than 50% of the watershed upstream of the reach is controlled by dams.

13. River Banks Structurally Altered by Human Activity (F6b). Altered river banks are those having impaired structural integrity (strength or stability) due to human causes. These banks are more susceptible to cracking and/or slumping. Count as river bank alteration such damage as livestock or wildlife hoof shear and concentrated trampling, vehicle or ATV tracks, and any other areas of human-caused disruption of bank integrity, including rip-rap or use of fill. The basic criterion is any disturbance to bank structure that increases erosion potential or bank profile shape change. One large exception is lateral bank cutting caused by stream flow, even if thought to result from upstream human manipulation of the flow. The intent of this item is to assess only direct, on-site mechanical or structural damage to the banks. Each bank is considered separately, so total bank length for this item is approximately twice the reach length of channel in the polygon (more if the river is braided).

NOTE: Constructed river banks (especially those with rip-rap) may be stabilised at the immediate location, but are likely to disrupt normal flow dynamics and cause erosion of banks downstream. The width of the bank to be considered is proportional to stream size. The table below gives a conceptual guideline for how wide a band along the bank to assess.

Stream Size (Bankfull Channel Width)	Width of Band to Assess for Bank Alteration
Rivers (Larger Than 15 m [>50 ft])	4 m (13 ft)
Small Rivers and Large Streams (Approx. 5-15 m [16-49 ft])	2 m (6 ft)
Small Streams (Up To Approx. 5 m [16 ft])	1 m (3 ft)

Scoring:

- 6 = Less than 5% of the bank is structurally altered by human activity.
- 4 = 5% to 15% of the bank is structurally altered by human activity.
- 2 = 15% to 35% of the bank is structurally altered by human activity.
- 0 = More than 35% of the bank is structurally altered by human activity.

14. Human Physical Alteration to the Rest of the Polygon (F19d). Within the remainder of the polygon area, outside the river bank area that was addressed in the previous question, estimate the amount of area that has been physically altered by human causes. The purpose of this question is to evaluate physical change to the soil, hydrology, etc. as it affects the ability of the natural system to function normally. Changes in soil structure will alter infiltration of water, increase soil compaction, and change the amount of sediment contributed to the water body. Every human activity in or around a natural site can alter that site. This question seeks to assess the accumulated effects of all human-caused change. Count such things as:

- **Soil Compaction.** This kind of alteration includes livestock-caused hummocking and pugging, recreational trails that obviously have compacted the soil, vehicle and machine tracks and ruts in soft soil, etc.
- **Plowing/Tilling.** This is disruption of the soil surface for cultivation purposes. It does not include the alteration of drainage or topographic pattern, which are included in the **Topographic Change** category.
- **Hydrologic Change.** Include area that is physically affected by removal or addition of water for human purpose. The physical effects to look for are structures, such as water diversions, ditches, and canals that affect the drainage pattern; as well as erosion due to reduced or increased water; bared soil surface that had water cover drained away; or area now flooded that previously supported a drier vegetation type.
- **Road/Railroad Bed.** Along many river road and railroad beds are constructed adjacent to the stream channel. These structures represent disruption to the bank integrity, to the bank vegetation.
- **Topographic Change.** This is the deliberate alteration of terrain for human purposes. It may be a result of earth moving by mining or construction activities, for aesthetic reasons (i.e., landscaping), or other reasons.
- **Impervious Surface.** Including hardened surfaces like roads, sidewalks, roofs, boat launches, or any human made surface from which water will run off, rather than infiltrate the soil.
- **Other.** List any other kinds of physical alteration not described above, and describe them in the space provided.

Scoring:

- 3 = Less than 5% of the polygon is altered by human causes.
- 2 = 5% to 15% of the polygon is altered by human causes.
- 1 = 15% to 25% of the polygon is altered by human causes.
- 0 = More than 25% of the polygon is altered by human causes.

15. Natural Floodplain Accessibility (F26). Many of the most important functions of a riparian ecosystem depend upon the ability of the channel to access its floodplain during high flows. This access is restricted by levees and other human constructed embankments, such as roadbeds. Evaluators should determine what fraction of the historic 100 year floodplain within the polygon remains unrestricted by such embankments. This can usually be determined by comparing the area within the embankments (as shown on the latest photos or maps available).

Scoring:

6 = More than 85% of the natural floodplain is accessible to flood flows.

4 = 65% to 85% of the natural floodplain is accessible to flood flows.

2 = 35% to 65% of the natural floodplain is accessible to flood flows.

0 = Less than 35% of the natural floodplain is accessible to flood flows.

Calculating the Lotic Health Score For Large Rivers

To arrive at the overall site health rating, the scores are totaled for all the factors, and that total is divided by the possible perfect score total. An example score sheet is shown below.

Vegetation Factors	Actual Pts	Possible Pts
1. Cottonwood and Balsam Poplar Regeneration	2	6
2. Regeneration of Other Native Tree Species	2	3
3. Regeneration of Preferred Shrub Species	4	6
4. Standing Decadent and Dead Woody Material	2	3
5a. Browse Utilization of the Preferred Trees and Shrubs	2	3
5b. Live Woody Vegetation Removal by Other Than Browsing	3	3
6. Total Canopy Cover of Woody Species	3	3
7a. Total Canopy Cover of Invasive Plant Species (Weeds)	2	3
7b. Density/Distribution of Invasive Plant Species (Weeds)	2	3
8. Disturbance-Increaser Undesirable Herbaceous Species	<u>2</u>	<u>3</u>
Vegetative Score:	24	36
Soil/Hydrology Factors	Actual Pts	Possible Pts
9. River Bank Root Mass Protection	4	6
10. Human-Caused Bare Ground	6	6
11. Removal or Addition of Water from/to the River System	6	9
12. Control of Flood Peak and Timing by Upstream Dam(s)	3	9
13. River Banks Structurally Altered by Human Activity	4	6
14. Human Physical Alteration to the Rest of the Polygon	2	3
15. Natural Floodplain Accessibility	<u>6</u>	<u>6</u>
Soil/Hydrology Score:	31	45
TOTAL SCORE:	55	81

Health Rating Formula: Health Rating = (Total Actual Score) / (Total Possible Score) x 100%
 Rating = (55) / (81) x 100% = 68%

Health Category: 80 to 100% = Proper Functioning Condition (Healthy)
 60 to less than 80% = Functional At Risk (Healthy, but with Problems)
 Less than 60% = Nonfunctional (Unhealthy)

Because of their size and the cumulative effects from upstream and downstream impacts, management of individual reaches along a river may be more difficult to implement than actions appropriate for smaller riparian areas. This characteristic of river systems argues for the larger watershed approach, which is increasingly being taken to address riverine ecosystems.

A manager should realize that while certain factors affecting function of the river on the site may be outside their control, the system health is nevertheless degraded by such factors as Removal or Addition of Water from/to the River System and Control of Flood Peak/Timing by Upstream Dam(s), even though these are occurring off his property upstream. A managers only recourse may be to work together for a more cooperative, integrated approach to management of the whole system.

While a less than perfect score is not always cause for great concern, and an area rating at 80% is considered to be functioning properly, the scores of individual factors on the form can be useful in detecting strengths or weaknesses of a site. A low score on any factor may warrant management focus. For example, the sample shown above has low scores for Cottonwood Regeneration from Seed, Removal or Addition of Water from/to the River System and Control of Flood Peak/Timing by Upstream Dam(s) (items 1, 13, and 14). Of these factors, a manager might bring improvement to item 1 by changing timing of grazing.

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