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New Mexico Environment Department (NMED) Surface Water Quality Bureau (SWQB)

Standard Operating Procedure (SOP) for

PHYSICAL HABITAT MEASUREMENTS



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9/17/19

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1.0 Purpose and Scope

The purpose of this procedure is to describe the process for measuring the physical habitat attributes and geomorphic characteristics relating to the dimension, pattern, and profile of wadeable streams. This procedure can be applied to “larger rivers” however exemptions do apply, for more information reference the SWQB *Comprehensive Assessment Listing Methodology*, Sedimentation Appendix. Measurements include a reach wide pebble count, thalweg profile, large woody debris estimate, cross section survey, bankfull cross-section and streamflow, percent canopy cover and slope. If biological collections such as periphyton, benthic macroinvertebrates, or fish are needed, refer to appropriate SOP for data collection methods. All SWQB SOPs can be found at <https://www.env.nm.gov/surface-water-quality/sop/>.

In order to understand the current condition and predict the future condition of a flowing waterbody, it is necessary to determine certain characteristics relating to dimension, pattern, and profile. The hydraulic geometry (also known as river morphology or geomorphology) of a stream is important when investigating sediment transport and relative channel stability. According to Rosgen (1996), "For a stream to be stable it must be able to consistently transport its sediment load, both in size and type, associated with local deposition and scour." Similarly, channel characterization and percent canopy cover are important because they significantly impact water temperature and will influence whether a stream will meet the temperature standard for its aquatic life use.

SWQB's habitat and geomorphology data may be used for but not limited to the following activities:

- assess the general narrative standards for sedimentation/siltation, plant nutrients, and biological integrity using the SWQB assessment protocol (NMED/SWQB 2017 or most recent);
- evaluate quality of habitat and channel stability, aid in identification of stressors in impaired reaches, and supply data for TMDL development
- provide baseline data to refine water quality standards, classify waterbodies and define reference conditions;
- monitor differences above and below a perturbation, point source, best management practice (BMP), and/or non-point source disturbance; and
- review plans or proposals submitted for in-stream construction activity (CWA §404/§401 certification).

2.0 Personnel Responsibilities

The Quality Assurance Officer (QAO) is involved in the development and revision of this SOP to ensure the SOP meets the requirements of the SWQB's Quality Assurance Project Plan. The QAO, along with the Subject Matter Expert and Program Manager will determine if any revisions to this SOP are needed at a minimum of every two (2) years in accordance with SOP 1.1 for the Creation and Maintenance of SOPs (<https://www.env.nm.gov/surface-water-quality/sop/>). Pending the review and approval of the document, the QAO will ensure the SOP is accessible through the SWQB's website

Personnel who conduct physical habitat sampling and data validation and verification activities or who supervise those who do must be familiar with this SOP.

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Technical staff should have experience collecting geomorphic, hydrological, and biological data in New Mexico streams. All new Monitoring Team employees will receive training and perform each of the field measurements described in this SOP under the supervision of a senior technical staff member at least once before being permitted to make these measurements without a senior technical staff member present.

3.0 Background and Precautions

This SOP is designed to be used in wadeable perennial streams and is not appropriate for generating sedimentation/siltation data for assessment of large river systems, intermittent or ephemeral streams, lakes and reservoirs, beaver ponds or backwater features, or wetlands. If a site is dry or has isolated pools the visit will be recorded as such.

If the habitat or biological sampling is not done at an established water quality station, then the location and distance from the nearest established station within the same AU will be documented on the appropriate field sheets. If the work is done more than 1 kilometer from the water quality station, then a new station will be established.

If biological monitoring such as fish, benthic macroinvertebrates or periphyton are scheduled to be collected at a particular site, both physical habitat and biological field measurements will be collected during the biomonitoring index period and at least six weeks after a scouring flow event. (Biggs & Kilroy 2000). The occurrence of recent scouring of the course substrate can be determined with an evidence based approach. Note recent depositional features, incisions, downcuts, wrack lines at or above assessed bankfull, absence of periphyton growth, folded in-channel vegetation, folded vegetation on the floodplain, and translocation of the current year leaf litter on active floodplain. If nearby gage data are available, note any high flows with gage height 3x the previous week average. The occurrence of four or more of these factors is considered a scour event. Attempt to estimate the timing of the event with gage data or new vegetation emergence. If timing cannot be determined, assume that the event occurred the previous day and plan resampling accordingly.

If concurrent biological monitoring is planned, SWQB's Physical Habitat surveys are completed during stable low flow conditions, between August 15 and November 15 (preferably before deciduous tree leaves have dropped), because this is SWQB's historic biomonitoring index period. If no biological monitoring is planned or needed at a particular site, physical habitat surveys may be conducted during the above described index period, or during baseflow conditions post snowmelt runoff and prior to the monsoon season (generally mid-May through early-July or late- fall to early-winter depending on location and weather patterns).

3.1 Sampling During or After Rain Event

Do not sample during high flow rainstorm events. It is often unsafe to be in the water during such times and biological and chemical conditions during and after high flows are often quite different from those during baseflows. Some compromise is necessary regarding whether to sample a given stream because of storm events. This decision is based on the following

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guidelines to help determine the influence of rain events:

1. If the stream is running at or above bankfull flow or the water seems much more turbid than typical for the class of stream do not sample that day.
2. Do not sample a stream if it is unsafe to wade the majority of the stream reach.
3. Keep an eye on the weather reports and rainfall patterns. Do not sample a stream during periods of prolonged heavy rains.
4. If the stream seems to be close to normal summer flows and does not seem to be significantly influenced by recent storm events, proceed with sampling even if it has recently rained or is raining, and document site conditions on the field form.

If you decide a site is significantly influenced by a storm event, do not sample the site that day and document the site conditions on the field forms so the stream can be rescheduled for another visit.

3.2 Rule of 10

Wading across a stream bed can be very dangerous depending on flow and substrate conditions. Do not attempt to wade into a stream if the depth (in ft) multiplied by the velocity (in ft/s) equals or exceeds 10 square feet per second (ft²/s). For example, a stream that is 2 ft deep, and has velocities of 5 ft/s or more, should be considered too dangerous to wade. If you unknowingly start to take measurements and discover part of the way across that you are/will violate the rule of ten, return to the nearest bank and note “too fast/deep to measure” on the field form. Refer to SWQB’s Job Hazard Analysis (JHA) for further safety precautions when conducting field work.

3.3 Streambed Concerns and Obstacles

Some channels have quicksand-like areas, deep holes, sharp rocks, excessive fallen logs, etc., that can lead to foot entrapment, injury, or falls. A wading rod, surveyor’s rod, ski pole, or stick can be used for stabilization and to probe the streambed when conditions are uncertain. Staff should use best professional judgment to assess risks involved with data collection. Refer to SWQB’s JHA for further safety precautions when conducting field work.

4.0 Definitions

Assessment Units (AUs) – River or stream reaches defined by various factors such as hydrologic or watershed boundaries, geology, topography, incoming tributaries, surrounding land use/land management, water quality standards, etc. AUs are designed to represent waters with assumed homogeneous water quality (WERF 2007). Stream or river AUs in New Mexico are typically no more than 25 miles in length unless there are no tributaries or land use changes to consider along the reach (NMED/SWQB 2017).

D84 – Is the 84th percentile measurement. The percentile is the measure used in statistics indicating the value below which a given percentage of observations in a group of observations fall. For example, the

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84th percentile is the value (or score) below which 84 percent of the observations may be found.

Program Manager – An individual within the SWQB that manages a program such as the Watershed Protection Section (WPS), the Point Source Regulation Section (PSRS) or the Monitoring, Assessment and Standards Section (MASS). The Program Manager and Project Manager are not necessarily synonymous.

Quality Assurance Officer (QAO) – An individual within the MASS that is responsible for overseeing the development and implementation of all quality assurance procedures and processes within the SWQB including those projects that receive support or funding from the SWQB. The QAO is also responsible for validating and verifying data sets for potential use in assessment of surface waters.

Standard Operating Procedure (SOP) – A document that lists the steps that should be completed when doing a task.

Subject Matter Expert (SME) – A person who is familiar with the purpose and procedure for accomplishing a task. The SME may be the same individual as the Project Manager.

Surface Water Quality Bureau (SWQB) – A Bureau under the Water Protection Division of the New Mexico Environment Department. The SWQB’s mission is to preserve, protect, and improve New Mexico’s surface water quality for present and future generations.

Trainee – A person undergoing training for a particular data collection survey(s) identified in this SOP.

The following habitat type definitions may be utilized in any aspect of physical habitat monitoring, especially in field notes, documentation of transect type, and descriptions of habitat diversity.

Bankfull Stage or Bankfull Height – is defined as the point of incipient flooding or the elevation where flows overtop the active channel and spread across an adjacent active floodplain as constructed by the present stream in the present climate, and frequently inundated (Dunne and Leopold, 1978) at intervals of 1 to 2 years and represent the channel forming or maintenance flow. The bankfull flow is equivalent to the “effective discharge”; the flow which transports the greatest volume of sediment over time. Evidence from a large number of streams suggests that these flows are frequent, moderate sized flows with a typical return interval of 1-2 years and that they represent the channel forming or maintenance flows. Bankfull height measurements are taken by measuring the distance from the water’s surface to the bankfull tagline, leveled surveyor’s rod or tape.

Left Bank – the bank on the left as the observer faces downstream (in the direction of flow)

Right Bank – the bank on the right as the observer faces downstream (in the direction of flow)

Bankfull Width – the distance between the bankfull stage on the left and right bank

Dry Channel - No water in the channel.

Large Woody Debris – is defined as woody material with a small end diameter of at least 10 cm (4 in.) and a length of at least 1.5 m (5 ft).

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Off-Channel Areas – Side-channels, sloughs, backwaters, and alcoves that are separated from the main channel.

Percent Canopy Cover – The amount of riparian vegetation intercepting solar radiation may be quantified as the average percent canopy density.

Pools – Still water, low velocity, smooth, glassy surface, usually deep compared to other parts of the channel.

Run or Glide – Water moving slowly, with a smooth, unbroken surface. Relatively shallow and low turbulence.

Riffle – Turbulent, shallow flow; Water moving, with small ripples, waves and eddies -- waves not breaking, surface tension not (or barely) broken. Sound: "babbling", "gurgling".

Thalweg – refers to the flow path of the deepest water joining the lowest points in a stream channel. The path followed by most of the water in a stream.

Wetted Width – the width of the stream bed covered by water perpendicular to flow.

5.0 Equipment and Tools

- Field forms printed on rain proof paper
- Bank pins
- Measuring tape (with both standard and metric units)
- Metric ruler and Measuring Caliper
- 2 telescoping surveyor's rods (metric scale, 7.5 m extended)
- 1 meter stick (alternatively, a short (1-2 m) rod or pole (e.g. ski pole) calibrated with cm markings for thalweg measurements, or the PVC pipe described for slope determinations can be marked in cm and used)
- Densimeter modified with taped "V"
- Clinometer or Hand level with PVC "tripod"
- GPS unit
- 5 – 10 flags to mark transects
- Recommended 1 or 2 fisherman's vest with lots of pockets and snap fittings (used at least by person conducting the in-channel measurements to hold the various measurement equipment (densimeter, clinometer, etc.); useful for both team members involved with physical habitat characterization)
- Chest waders; hip waders can be used in shallower streams
- Clipboards (
- Soft lead (#2) pencils
- SOP and/or quick reference guides for physical habitat printed on Write in the Rain® paper.
- Digital camera

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6.0 Step-by-step Process Description

6.1 Office Procedures (Prior to field work)

For planning and scheduling purposes, review field sampling plan to confirm planned physical habitat sampling locations and needs. Before conducting field work, view satellite imagery using the online SWQB mapping tool or another online imagery application. Ensure that the reach area is representative of the AU being characterized. If necessary, contact landowners to gain access to the area.

Table 1. Survey Layout

Physical Habitat Components	Layout Location
Pebble Count	All Transects ²
Bankfull and Flow	One Lettered Transect ¹
Cross Section Profile	Lettered Transects A-E
Thalweg Profile	Thalweg Profile Stations
LWD Estimate	Between Lettered Transects
Percent Canopy Cover	Lettered Transects A-E
Slope	Entire Reach (Transect E- to Transect A)

¹ The preferred location is at Transect C, but the location can be moved as necessary to find an area that is straight and flow is perpendicular to the cross section. Conduct at one transect only.

² All Transects includes lettered and intermediate transects (i.e., entire reach)

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6.2 Reach Selection and Layout

6.2.1 Reach Selection

The reach selection is a critical decision that can greatly influence the outcome of subsequent field procedures. Before selecting a location for the survey note the character of the stream while driving to the site, and conduct a site walk to ensure that the reach is representative of the AU being characterized. Take time to walk upstream and downstream of the monitoring station to observe the occurrence of riffle-run-pool sequences, riparian and bank characteristics, and isolated features such as culverts or other human disturbances. Do not include culverts within the reach. Isolated human disturbances can be included if they are present throughout in the AU. Do not include human made channels/features and recent restoration unless they make up the entire AU. Keep these factors in mind to ensure a representative proportion of geomorphic and disturbance features are in the selected reach.

While conducting the site walk, measure the wetted width of the stream in at least five locations. The average wetted width is used to determine the length of the study reach. Data collection must not be made at one point without first walking a 250-meter reach in the vicinity of the monitoring station.

If the channel is covered by greater than 50% rooted vegetation and dominated by fine substrate, record this on the field sheet, document with photos and do not conduct any surveys/data collection. Abundant growth of aquatic vegetation can be indicative of riverine wetland systems which are associated with free-flowing bodies of water. “Macrophyte” is a general term that applies to many types of aquatic vegetation. Emergent macrophytes grow in depths of water generally less than a meter and are typically rooted in the sediment with a portion of the plant in the water and part extending into the air, whereas submerged macrophytes grow completely underwater. Common emergent macrophytes include reeds (*Phragmites spp.*), bulrushes (*Scirpus spp.*) and cattails (*Typha spp.*).

6.2.2 Reach Layout

Calculate the average wetted width from the wetted widths measured during reach selection to determine the length of the study reach. For streams with an average wetted width less than or equal to 4.0 m, a representative reach is 160 meters. For streams with widths greater than 4.0 m, the length of the study reach is 40 times the average wetted width. The reach length is measured along the stream channel following the sinuous path of flow. Surveys are grouped into activities and are performed at specific locations along the study reach (Figure 1). Since the pebble count (Substrate Size classification) is the first activity to be performed, the transects for the other measurements (e.g., channel dimensions, streamflow, etc) can be established as the pebble count is being conducted (Table 2). Record GPS location of Transect A and Transect E on Physical Habitat **Field Form Cover Sheet**.

Table 2. Location and intervals of transects for surveys activities. As shown in Figure 1 Reach Layout (next page).

	SMALL STREAMS (average wetted width less than or equal to 4.0 m)	LARGE STREAMS (average wetted width greater than 4.0 m)
Reach Layout	5 Lettered Transects spaced 40 meters apart	5 Lettered Transects at 10X average wetted width apart
Transect (Flow, Cross Section, Canopy Cover)	Example: Average wetted width = 3m Distance between transects = 40m Total Reach Length = 160m Transect A (1st transect) = 0 meters Transect E (5th transect) = 160 meters	Example: Average wetted width = 6m Distance between transects = 60m Total Reach Length = 240m Transect A (1st transect) = 0 meters Transect E (5th transect) = 240 meters
Intermediate Transect (Pebble Count)	21 Contiguous Transects spaced 8 meters apart (i.e., entire reach layout) Example: Average wetted width = 3 Distance between intermediate transects = 8 Total Reach Length = 160	21 Contiguous Transects at 2X average wetted width (i.e., entire reach layout) Example: Average wetted width = 6 Distance between intermediate transects = 12 Total Reach Length = 240
Thalweg Profile Stations	Measure thalweg depth every 1.0 meter (160 total measurements) Example: Average wetted width = 3 Distance between profile stations = 1 Total Reach Length = 160 Total measurements = 160	Measure thalweg depth at intervals equal to total reach length divided by 160 (160 total measurements) Example: Average wetted width = 6 Distance between profile stations = 1.5 Total Reach Length = 240 Total measurements = 160

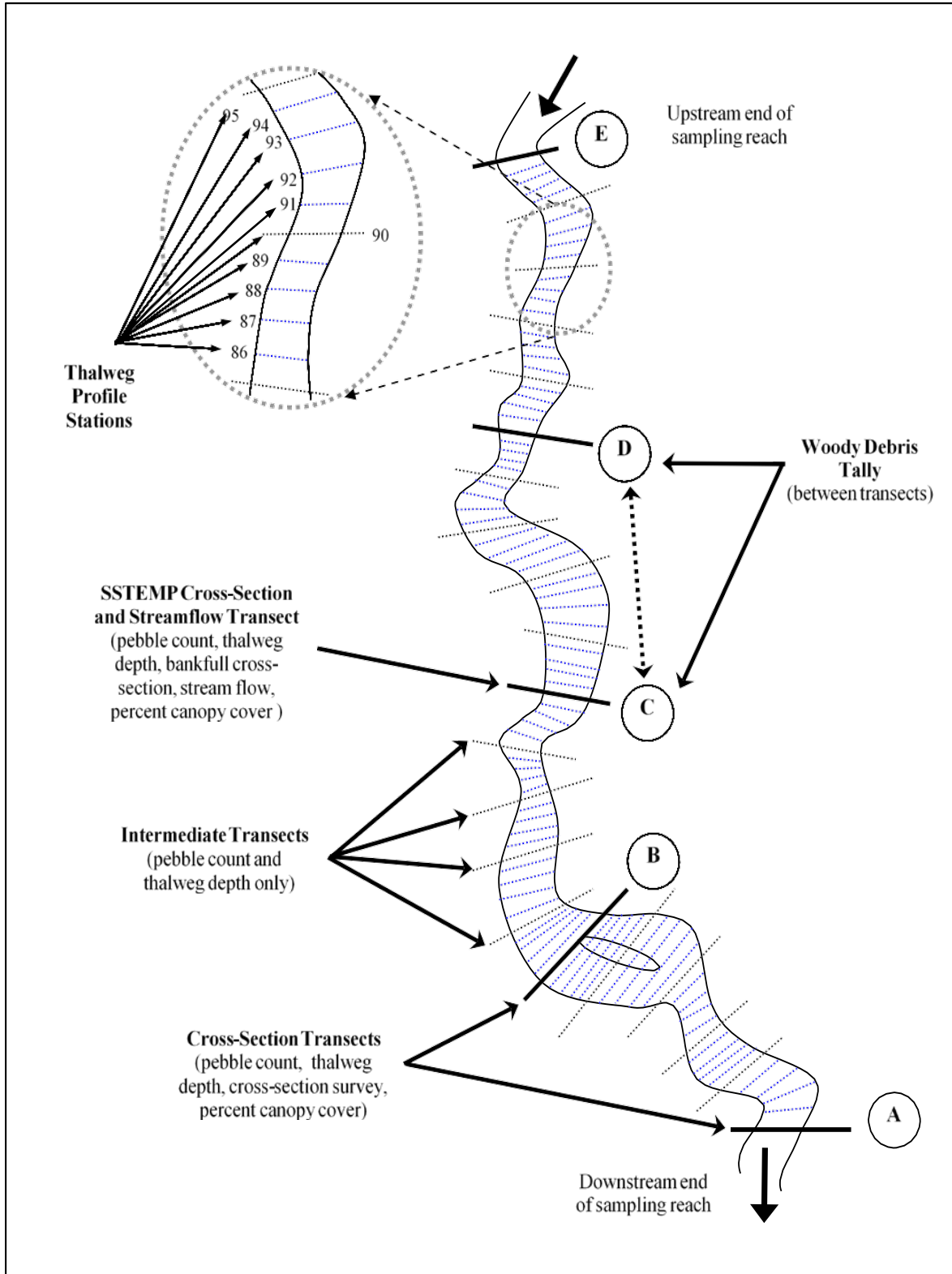


Figure 1. Reach layout for physical habitat measurements, **record location of Transect A and E w/GPS**

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6.3 Logistics and Work Flow

The seven components of physical habitat measurements are organized into grouped survey activities:

1. Pebble Count (Section 6.3.1)
2. Cross Sectional Profile, Thalweg Profile and Large Woody Debris Estimate (Section 6.3.2)
3. Bankfull Cross-Section and Stream Flow (Section 6.3.3)
4. Percent Canopy Cover (Section 6.3.4)
5. Slope (Section 6.3.5)

Surveys should be performed concurrently but no greater than 24 hours apart. **Do not** separate survey activities 2-5, as data from these activities are used in conjunction with one another for assessment calculations (i.e. determination of Relative Bed Stability) and temporal variation should be limited. If survey activities 2-5 are separated in time; events such as floods or reservoir releases could occur between the activities that change the character of the channel effecting calculation for Relative Bed Stability. Once a particular survey has been started by an observer, the initial observer will be required to complete the survey in its entirety for that monitoring station. For instance, if an observer begins the pebble count survey the same observer will be required to complete the entire pebble count survey in its entirety for that particular monitoring station. Observers may change from one particular survey to another at each monitoring station (e.g., one observer may collect data for the pebble count survey and a different observer may collect data for percent canopy cover survey for the same monitoring site).

6.3.1 Pebble Count

Substrate size is one of the most important determinants of habitat character for fish and macroinvertebrates in streams. The term substrate size is used to describe the size of streambed surface particles. Substrate size is evaluated at each of 21 equally- spaced transects (refer to Figure 1 and Table 2) using modified EMAP methods (Peck, et al. 2006). For a reach length of 160m, transects will be 8m apart. For longer reaches, the distance between intermediate transects is the reach length divided by 20. Distance between the transects can be determined using a measuring tape held between the downstream and upstream transect and should follow the stream channel. The basis of this protocol is a systematic selection of 5 substrate particles from each of the 21 transects. The substrate sampling points along the transects are located at 0, 25, 50, 75, and 100 percent of the measured wetted width, with the first and last points just inside (approximately 5 cm) of the water's edge (Figure 2).

If the channel is split by a predominately non-vegetated mid-channel bar, the five substrate points are still placed between the overall wetted width boundaries regardless of the mid-channel bar in between. Consequently, substrate particles measured in some portions of a transect may actually be above the current water surface. If there is a vegetated mid-channel bar that splits the channel into roughly two equal parts, measure three pebbles in one half and two in the other. If the majority of flow is to one side of a vegetated bar, measure all five pebbles in the dominant channel as described in the above paragraph. For transects that are entirely dry, make measurements across the unvegetated portion of the channel. Be sure to note the occurrence of dry mid-channel bars on the field form.

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The procedure for obtaining substrate measurements (i.e. pebble count) is described below. Record measurements in the PEBBLE COUNT section of the Pebble Count Field Form. To minimize bias in selecting a substrate particle for size classification, it is important to concentrate on correct placement of your foot along the cross-section and to select the particle right off the tip of your big toe (not, for example, a more noticeable large particle that is just to the side of your foot). It is also important that bare hands are used, so that the subtle differences in FINES and SAND are observed.

When differentiating between SAND and FINES, follow these steps:

- If the selected point is possibly less than or equal to 2mm, pinch a small pea-sized amount of material and remove it from the stream.
- First confirm that the particles in the sample are less than or equal to 2mm.
- If less, rub the material between the forefinger and thumb. Any feeling of grittiness or the feeling of single grains rolling between your fingers indicates SAND.
- A slick or sticky feeling, or a lack of grittiness indicates FINES.

***ANY feeling of grittiness should be recorded as SAND.**

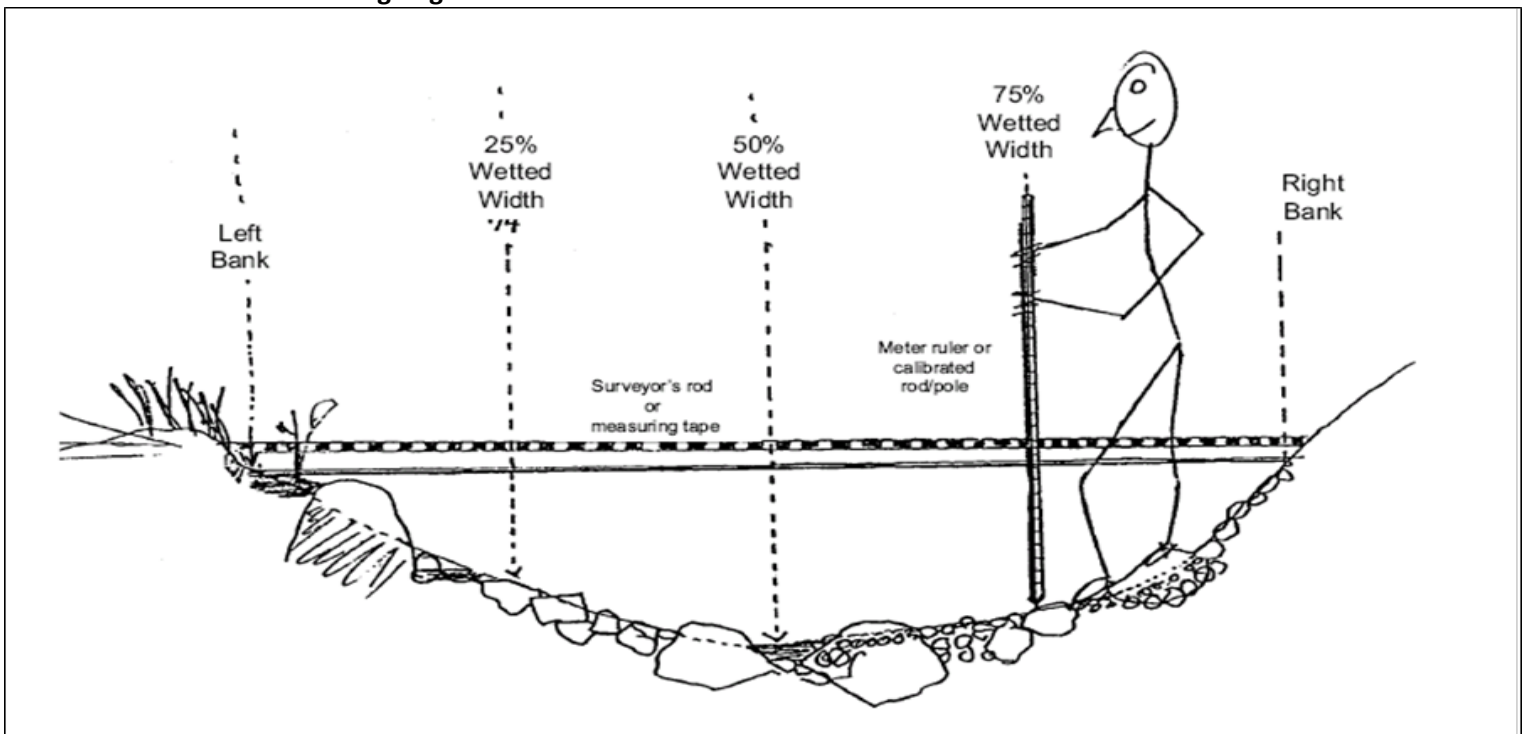


Figure 2. Substrate Sampling Cross-Section.

PEBBLE COUNT PROCEDURE

1. Starting at the bottom of the reach (Transect A), divide the **WETTED WIDTH** channel by 4 to locate the substrate measurement points along the transect (Left Edge, 25%, 50%, 75%, and Right Edge), with the first and last points just inside (approximately 5 cm) of the water's

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edge).

- Place your foot at each measurement point along the transect. Avert gaze (do not look down unless needed for safety), slide your index finger straight down off of your big toe, and pick up the first particle touched by the tip of your index finger. If a sand or fines substrate layer is present but too thin to grab a pea-sized pinch, sample the underlying substrate. Measure the intermediate axis with a metric ruler or measuring caliper (refer to **Figure 3**). If the particle is too large to pick up measure the intermediate axis under water with a ruler, surveyors rod, or measuring tape. Record the intermediate axis in millimeters (pebble width) in the PEBBLE COUNT section of the field form corresponding to the transect and location along transect (Left Edge, 25%, 50%, 75%, Right Edge).

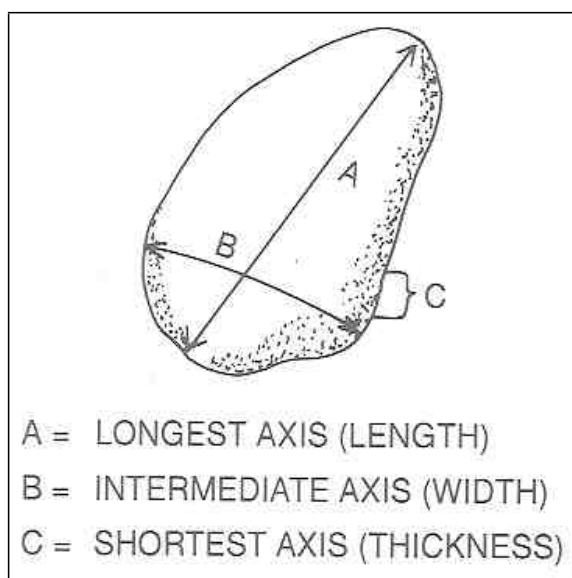


Figure 3. Substrate particle showing its 3 main axes of measurement. (Harrelson, et al. 1994).

- Record particles that have an intermediate axis larger than 2mm as a whole number in the field sheet. "Gritty" particles with an intermediate axis less than 2mm are recorded as **SAND**. "Smooth" particles less than 2mm are recorded as **FINES**. Bedrock and consolidated substrates are recorded as **BEDROCK**. Streams with a calcified substrate cementing individual particles into a consolidated layer are also recorded as **BEDROCK**. If the particle encountered is not lithic in origin (i.e. wood, trash, etc.) move the sampling point to a new location in the transect.
- Move successively to the next location along the transect. Repeat step 2 at each transect location.
- Proceed upstream to the next intermediate transect (see Figure 1) and repeat steps 1-4. Substrate measurements will be collected starting at Transect A, all intermediate transects between Transects A-B, B-C, C-D and D-E. Substrate measurements will conclude at Transect E for a total of 105 individual pebble measurements.

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6. Tally the total number of pebbles that are considered sand or fine sediment (i.e. particles less than or equal to 2 mm) and calculate the percent sand/fines by dividing the number of sand/fine particles by the total number of particles (105), then multiply by 100.

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6.3.2 Cross Sectional Profile, Thalweg Profile and Large Woody Debris Estimate

CROSS SECTIONAL PROFILE

Data are recorded in the **Cross Section, Thalweg Profile, and Large Woody Debris Field Form**. Features measured include wetted width, depth of water, bankfull width, and bankfull height. Bankfull height is measured relative to the present water surface. In other words, bankfull height is measured up from the level of the wetted edge of the stream to the bankfull level indicator.

Determining Bankfull Width:

There is no single, absolute and definitive line for bankfull stage. Instead, the strategy is to build a case for identification of bankfull based on physical evidence at the site. The best evidence of bankfull stage is a series of features that are depositional, containing similar substrate and vegetation components, and lying at a consistent elevation, such as:

- topographic breaks in slope
- tops of point bars
- changes in vegetation
- changes in size of bank or bar materials
- evidence of an inundation feature such as small benches
- the presence of a floodplain
- exposed root hairs below an intact soil layer indicating exposure to erosive flow bank undercuts

If the stream or river has incised it may have abandoned the floodplain, which will make the former floodplain a low terrace. It is critical to distinguish the active floodplain from low terraces in the identification of bankfull stage. Remember that in many incised channels within New Mexico the most evident flat valley surface may actually be an abandoned terrace. Use common sense and local knowledge (including but not limited to regional curves) in deciding whether it is realistic that a particular elevation is inundated nearly every year. Where channels have incised and evolved to the point where a new depositional feature is redeveloping as an active floodplain, the determination of bankfull is less problematic and unambiguous. In other highly incised channels where bank erosion and bed scour are prominent, lack of consistent and unambiguous bankfull indicators may preclude any reliable determination of bankfull dimensions. In these situations, use best professional judgment in estimating bankfull dimensions and note the lack of consistent and reliable indicators on the field sheet.

Determining Bankfull Height:

Bankfull height is the distance from the water's surface to the bankfull indicator (as measured by a leveled surveyor's rod or tape). A tagline stretched across the bankfull width may be used as a measurement reference.

Bankfull Width and Bankfull Height Procedure Steps:

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1. Starting at the bottom of the reach (Transect A), lay a surveyor's rod or stretch a measuring tape (tag line) tight across the stream perpendicular to stream flow. Surveyors rod or measuring tape should be placed so that the "zero" end is at left bankfull, as viewed when looking downstream. If a measuring tape is used, measuring tape needs to be secured with bank pins on each side of reach and measuring tape should be pulled taut to minimize error due to sagging. Adjust the rod or measuring tape, as needed, to ensure that rod or tape is adjacent to ground level at left and right bankfull points. Determine bankfull width value on right bank at bankfull stage height (see **Determining Bankfull Width**). After determining bankfull width, measure bankfull height with meter stick or calibrated pole (see **Determining Bankfull Height**).

Bankfull width and bankfull height values are recorded in the TRANSECT A section of the Cross Section, Thalweg Profile, and Large Woody Debris Field Form. Record bankfull width in meters (m) and bankfull height in centimeters (cm).

NOTE: Do not remove surveyor rod or tag line until the entire procedure is complete (step 1-3)

2. After recording bankfull width and height start measuring channel dimensions. The first measuring point will be at left edge of water (Left Bank), then 25% of wetted width (LCtr), 50% of wetted width (Ctr), 75% of wetted width (RCtr) and 100% of wetted width (right edge of water/Right Bank).

Record values from tagline that correspond to measuring point in *Distance* fields of the Cross Section, Thalweg Profile, and Large Woody Debris Field Form. Values go in fields labeled Left Bank, LCtr, Ctr, RCtr, and Right Bank. Values are recorded in meters (m).

NOTE: Record these measurements only at lettered Transects A – E.

3. Place your meter stick or survey rod at the measuring point identified above, Left Bank, LCtr, Ctr, RCtr, and Right Bank. Measure the depth of water in centimeters (cm).

Record values it in the *Depth* field of the Cross Section, Thalweg Profile, and Large Woody Debris field form.

NOTE: Cross-section depths are only measured at lettered Transects A – E.

4. Proceed upstream to the next lettered transect and repeat steps 1 – 3.

THALWEG (LONGITUDINAL) PROFILE

The thalweg profile is a longitudinal survey of maximum flow path depth (deepest water joining the lowest points in a stream channel) at 160 evenly spaced intervals over the length of the study reach. The Thalweg Profile Procedure (below) describes in detail how to determine the distance between thalweg measurements.

The procedure for obtaining thalweg profile measurements is modified from Peck et al. (2006).

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Record data on the **Cross Section, Thalweg Profile, and Large Woody Debris Field Form**. A survey rod, metric ruler, or calibrated rod/pole is used to make the required depth measurements at each interval and to measure off the distance between stations as you proceed upstream. The first thalweg measurement is typically taken at the most downstream station in the study reach (*Transect A*) but can be started at either end of the study reach (Transect A or Transect E).

Thalweg Profile Procedure

One person begins at one end of study reach and walks carrying a survey rod taking depth measurements. A second person carries a clipboard with copies of the field sheets to record data.

1. Determine the interval length between thalweg measurements based on the wetted width used to determine the length of the study reach (see Table 2).
 - For widths less than or equal to 4.0m, measure thalweg depth every 1.0m (160 total measurements).
 - For widths greater than 4.0m, divide the reach length by 160 to determine thalweg depth intervals (160 total depth measurements).
2. Complete the header information on the field form. Record the interval distance determined in Step 1 in the *Interval Length* field on the **Cross Section, Thalweg Profile, and Large Woody Debris Field Form**.
3. Begin at the downstream end (*Transect A*) of the reach. Locate the flow path that connects the deepest points within the channel (the thalweg). This may not always be found at mid-channel and may not always be a point within the greatest flow path in every channel cross-section. Measure thalweg depth to the nearest centimeter and record it in the *Thalweg Depth* field on the field form. Read the depth on the **side** of the ruler, rod, or pole to avoid inaccuracies due to the wave formed by the rod in moving water. Multiple measurements should be taken by each observer at each thalweg profile station to ensure measurements were taken at the maximum flow path depth (deepest water joining the lowest points in a stream channel).

NOTE: For streams with interrupted flow, where no water is in the channel at the station, record zeros for depth.

NOTE: It is critical to obtain thalweg depths at **all** stations. *If the thalweg is too deep to measure while wading*, stand in shallower water and extend the rod or pole at an angle to reach the thalweg. Determine the rod angle by resting a clinometer on the upper surface of the rod and reading the angle on the external scale of the clinometer. Leave the depth reading for the station blank, but flag the measurement to indicate a non-standard procedure was used. Record the water level on the rod and the rod angle (vertical = 90°) in the comments section of the field form. When you return to the office, calculate the thalweg depth as the measured depth (length of rod that was under water) multiplied by the trigonometric *sine* of the rod angle. (For example, if 3 meters of the rod are under water when the rod was held at 30 degrees (*sine* = 0.5), the actual thalweg depth is 1.5 meters.) If a direct measurement cannot be obtained,

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make the best estimate you can of the thalweg depth and flag the data point to indicate that it is an estimated depth.

4. Proceed upstream to next station (determined by interval length) and repeat step 3 until all measurements are complete.

LARGE WOODY DEBRIS ESTIMATE

The large woody debris (LWD) estimate should **be performed concurrent with the thalweg profile** such that the recorder of the depth measurements also estimates the percent aerial coverage of woody material **within the bankfull channel**. This component of habitat characterization allows a semi-quantitative estimate of the number, volume and distribution of wood within the study reach. LWD is defined as woody material with a small end diameter of at least 10 cm (4 in.) and a length of at least 1.5 m (5 ft).

The estimate includes all pieces throughout the entire reach that are at least partially within the bankfull channel (Zone 1 or 2 in **Figure 5**) or bridging above it (Zone 3 in **Figure 5**). The active (or bankfull) channel is defined as the channel that is filled by moderate-sized flood events that typically recur every one to two years. Pieces of LWD that are not at least partially in Zones 1, 2, or 3 are not counted. Record estimates on the **Cross Section, Thalweg Profile, and Large Woody Debris Field Form**.

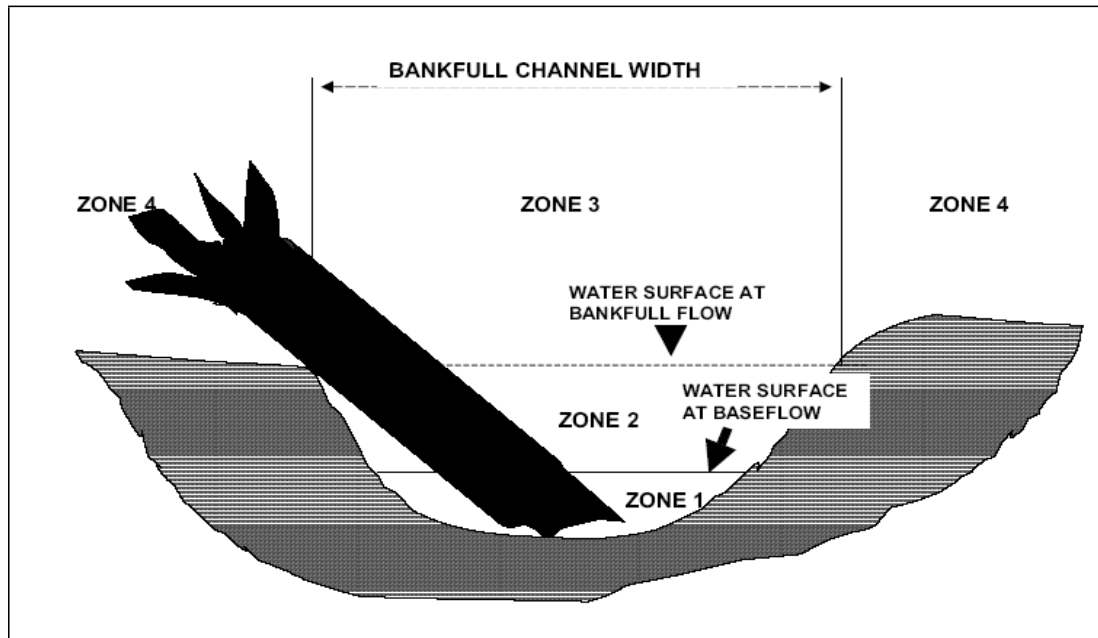


Figure 4. Large woody debris in bankfull channel

Procedure for Estimating Large Woody Debris

1. The LWD amounts are estimated between all lettered transects within the study reach (i.e.,

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between A-B, B-C, C-D, and D-E).

2. Scan the stream segment (A-B, B-C, etc.) for LWD and estimate the amount of LWD that are at least partially within the bankfull channel or are at least partially bridging the bankfull channel (Zones 1, 2, and/or 3 in Figure 5).
3. Write 1 in the appropriate box (dense, abundant, common, rare, absent) in the Large Woody Debris section of the field form. Dense is defined as greater than 75% of the reach has LWD within or bridging the bankfull channel; Abundant signifies 40- 75% of the reach has LWD; Common refers to 10-40% of the reach has LWD; and Rare indicates that less than 10% of the reach has LWD.
4. Repeat steps 2 and 3 for the next stream segment and record estimate on the field form.

6.3.3 Bankfull Cross-section and Stream Flow

Take stream flow (see SOP 7.0) and bankfull measurements at a single, suitable location within the study reach to characterize geomorphology conditions at the sampling point. The preferred location is at Transect C, but the location can be moved as necessary to find an area that is straight and flow is perpendicular to the cross section. Follow the procedures in 6.3.2 to identify bankfull width and height. Record the left and right bankfull distance on the tag line on the flow form. Measure and record the bankfull height on the flow form. Take at least one measurement from the ground to the tag line (bankfull height, see Figure 4) in between the wetted edge and bankfull edge. Do this on both banks and record on the flow form. An adequate number of measurements between the wetted edge and bankfull edge will be determined based on distance and topographic roughness; data should be collected to the tenth of a foot. Record all flow measurements in cubic feet per second and in tenth of feet and indicate which transect the flow was taken at. Follow SOP 7.0 to collect a flow measurement.

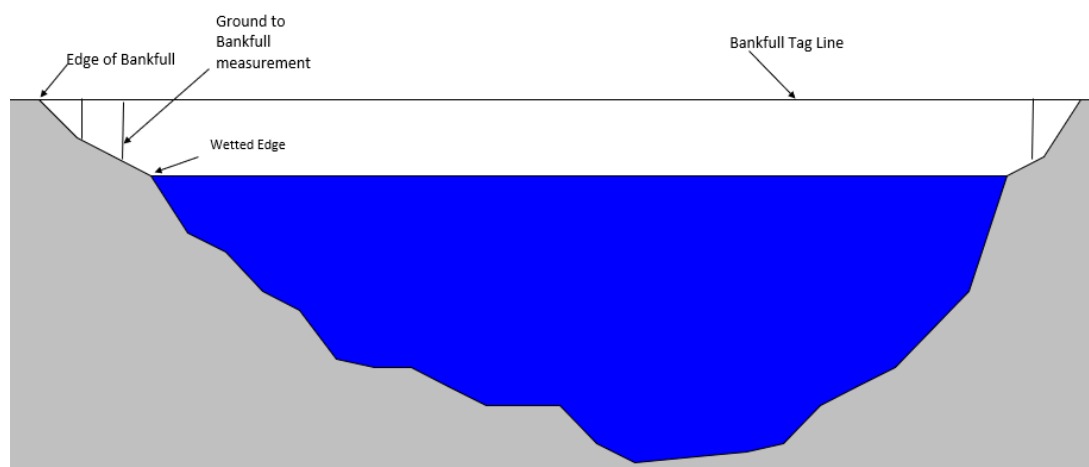


Figure 5. Bankfull and ground to bankfull tag line measurement.

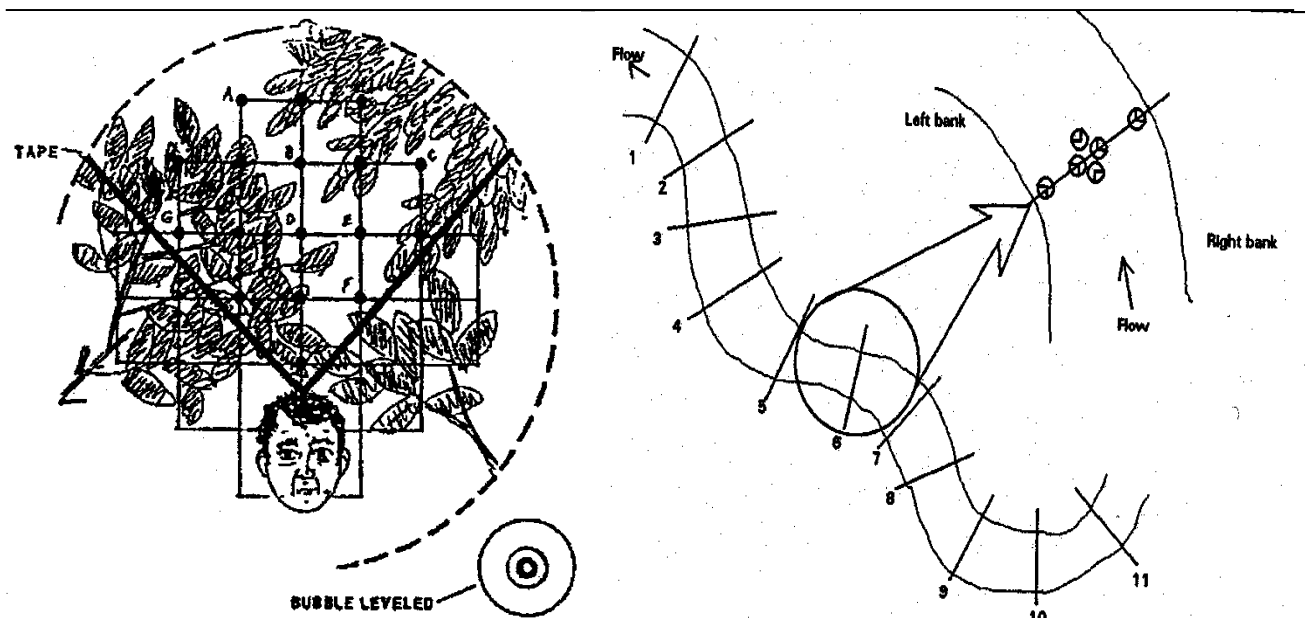
6.3.4 Percent Canopy Cover

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The amount of riparian vegetation intercepting solar radiation may be quantified as the average percent canopy density through the procedure outlined in this SOP.

Canopy cover over the stream is determined at each of the 5 lettered transects (Transects A – E). A convex, spherical densiometer is used (Lemmon 1957). Mark the densiometer with a permanent marker or tape exactly as shown in Figure 6 to limit the number of square grid intersections to 17. Densiometer readings can range from 0 (no canopy cover) to 17 (maximum canopy cover). Six measurements are obtained at each lettered transect (four measurements in each of the four directions at mid-channel and one at each bank as shown in Figure 6).

Densiometer measurements are taken at 0.3 m (1 ft) above the water surface, rather than at waist level, to (1) avoid errors because people differ in height; (2) avoid errors from standing in water of varying depths; and (3) include low overhanging vegetation more consistently in the estimates of cover. Hold the densiometer level (using the bubble level) 1 foot above the water surface with your face reflected just below the apex of the taped “V”, as shown in Figure 6. Concentrate on the 17 points of grid intersection on the densiometer that lie within the taped “V”. If the reflection of a tree, branch, or leaf overlies any of the intersection points, that particular intersection is counted as having cover. Any vegetation or overhanging bank covering the intersections is counted. For each of the six measurement points, record the number of intersection points (0 to 17) that have vegetation or bank covering them in the appropriate section of the **Percent Canopy Cover Field Form**. To calculate the measurements to percent canopy cover, the readings are summed and divided by the total possible points (Fitzpatrick, et al. 1998) and then multiplied by 100. The picture on the left depicted in Figure 6 would be recorded as a 10, which indicates that 10 intersections are covered on the modified densiometer. See canopy cover measurement procedure below.



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Figure 6. Proper use of densiometer and measurement locations within each transect (Mulvey et. al. 1992).

Procedure for Canopy Cover Measurements

1. At each lettered transect (Transects A – E), stand in the stream at mid- channel and face upstream.
2. Hold the densiometer 0.3 m (1 ft) above the surface of the stream. Level the densiometer using the bubble level. Move the densiometer in front of you so your face is just below the apex of the taped “V”.
3. Count the number of grid intersection points within the “V” that are covered by either vegetation or bank material. Record the value (0 to 17) in the *CENUP* field of the canopy cover measurement section of the **Percent Canopy Cover Field Form**.
4. Face toward the left bank (left as you face downstream). Repeat Steps 2 and 3, recording the value in the *CENL* field of the field data form.
5. Repeat Steps 2 and 3 facing downstream, and again while facing the right bank (right as you look downstream). Record the values in the *CENDWN* and *CENR* fields of the field data form.
6. Move to the water’s edge (either the left or right bank). Repeat steps 2 and 3 again, this time facing the bank. Record the value in the *LEW* or *REW* field of the field data form. Move to the opposite bank and repeat.
7. Repeat Steps 1 through 6 at each lettered transect (Transects A – E).
NOTE: Side channels are included when determining measurement locations when established islands are present at lettered transects (Transect A-E).

6.3.5 Slope

Slope is typically measured by two people, one using the clinometer and the other holding the survey rod and recording slope and distance. The intent is to measure the surface water slope, which may not necessarily be the same as the bottom or valley slope. A clinometer will be used to determine surface water slope. Please see procedure below **on Reading Percent Slope on a Clinometer or Hand level before proceeding**.

Procedure for Reading Percent Slope on a Clinometer or Hand Level

Clinometers and hand levels may read both percent slope and degrees of the slope angle; be careful to read and record percent slope. Verify this by comparing the two scales. Percent slope is always a higher number than degrees of slope angle (e.g., 100% slope = 45° angle). For slopes greater than 2%, read the percent slope to the nearest 0.5%. For slopes less than 2%,

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read to the nearest 0.25%. If the reading is 0% but the water is moving, record the slope as 0.1%. If the reading is 0% but the water is not moving, record the slope as 0%. The procedure for measuring slope using a clinometer or hand level is presented below.

Procedure for Obtaining Slope Data Using a Clinometer or Hand Level

This procedure generally begins at Transect E, after completing the thalweg profile and other cross-section measurements and/or pebble count, but may also be used starting at Transect A and moving upstream. Mark the method used on the Slope Field Form. If using some other method besides a clinometer or hand level, describe in comments section.

1. Measure the eye level of the person using the clinometer or hand level. This is the height (point on the rod) that will be used to determine slopes.
2. Stand in the center of the channel at the beginning cross-section transect. Determine how far you can see the center of the channel without sighting across land.
3. Have one person take the surveyor's rod downstream to the furthest point where you can stand in the center of the channel and still see the center of the channel at the upstream location. Measure the distance between the upstream and downstream locations using a measuring tape or laser range finder and record this distance on the field form. Report distance in meters. Measure the entire stream path capturing all the sinuosity. Do not measure over land and cut across meander bends.
4. Have the downstream person hold the surveyor's rod vertical (use bubble level to ensure rod is vertical) with the base at the same level as the water surface. If no suitable location is available at the stream margin, position the rod in the water and note the depth.
5. At the other location, have the person stand at water level or place the base of the calibrated rod/ruler at the same level as the surveyor's rod (either at the water surface or at the same depth in the water).
6. For the clinometer, have the downstream person mark eye level on the survey rod with their hand or clipboard. With the clinometer, sight back downstream to the marked height on the surveyor's rod at the downstream location. Record % slope.

For the hand level, sight back downstream to the surveyor's rod and indicate to the downstream surveyor where the level mark is on the rod. Take that height and subtract the height in step 1 to get your rise. Divide your change in height by your distance to get your percent slope.

7. Proceed to the next downstream, line-of-sight location and repeat Steps 3 through 6 until the entire study reach has been "sighted".

6.4 Photo-documentation

It is essential to take several photos of the reach condition and any disturbances or modifications that

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are relevant to data collection and assessment. Use a camera with GPS capabilities so that locations are collected with the metadata. Once back from the field, download photos into the project file.

7.0 Data Entry/Management

Enter all field form data into appropriate electronic Physical Habitat Forms (form can be found on the SWQB SOP website). Save these forms in the electronic project folder. Open the corresponding red worksheet (see **Figure 7**), copy the table, and paste the table into a blank excel workbook and save as csv file in the project file habitat folder. Each worksheet has to be saved into its own .csv file for upload.

TRANSECT - "X" for Periphyton - "O" for Benthics																											
A		A.5		B		B.5		C		C.5		D		D.5		E											
Sub	Hab	Sub	Hab	Sub	Hab	Sub	Hab	Sub	Hab	Sub	Hab	Sub	Hab	Sub	Hab	Sub	Hab										
Cover Sheet		Pebble Count		Cross-Section		Thalweg-LWD		Slope		BF X-Sec and Flow		Shade		Pebble UL		X-Section UL		Thal-150 UL		Thal-100 UL		Slope UL		BF Flow UL		Shade UL	

Figure 7. Example of worksheets requiring data entry. Red worksheets are used for upload

7.1 SQUID GEOMORPH/HABITAT EVENT CREATION AND EXCEL DATA UPLOAD INSTRUCTIONS

7.1.1 CREATING A GEOMORPH/HABITAT EVENT WITHIN A STATION

1. Select the Project tab on the Squid home page and select the appropriate project or use the Project Filter to search
2. Select the View/Add Monitoring Location page
3. Select the Sampling Events page for the specific station to which you are attaching Geomorph/Habitat data
4. Under the *Add New Sampling Events* tab select *Geomorph/Habitat* under the *Sampling Event Type* drop down list and click *Add New Sampling Event* button
5. Under the General tab, populate the sampling event with the appropriate metadata
 - a. Start Date
 - b. Field Staff
 - c. Flow Method
 - d. Comments
 - e. Data Collected
 - f. See Habitat and Biota Field Work Cover Sheet
 - g. Latitude and Longitude
 - h. Average Wetted Width
 - i. Pebble Count Reach Length
 - j. Thalweg Reach Length
 - k. Thalweg Reach Interval
6. When metadata entry is complete select Save

7.1.2 UPLOADING AN EXCEL DATA FILE TO THE SAMPLING EVENT

1. For each station open the *Sampling Event* page, under the *Type* column, go to the *Geomorph/Habitat* row for the particular monitoring date and time and select appropriate upload tab.
2. Select Browse within the filename window and navigate to the appropriate

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Geomorph/Habitat .csv file.

3. Select Upload File.

7.1.3 VIEWING UPLOADED DATA IN EXCEL

1. Select *Adhoc Report*,
2. Select *Project and Station*.
3. From the *Reports* sections select the *Geomorph/Habitat*.
4. Then Select Raw Data Report.

8.0 QA/QC

The SWQB controls the quality of the physical habitat field data by using standardized methods that are documented in this SOP. All personnel who collect physical habitat data must be familiar with these protocols, sign the acknowledgment form associated with this specific SOP and collect data in accordance with the procedures as they are defined in this SOP. In addition to standardized methods, proper training of field personnel represents a critical aspect of meeting the data quality objectives in order to fulfill the goals of the SWQB's QAPP (NMED/SWQB. 2018).

The SWQB implements QA/QC through the training of the procedures detailed in this SOP for physical habitat surveys. The SWQB personnel who conduct physical habitat surveys are required to receive training in the field and be supervised by MASS monitoring staff for all aspects of the habitat data collections. The MASS monitoring staff who conduct training in the field must have completed at least 1 field season of physical habitat data collection. Monitoring staff who have not completed 1 season of physical habitat data collection will be required to receive the same training as other SWQB personnel. Once field training has occurred and all aspects of habitat data collections have been observed as correct, personnel may conduct unsupervised habitat data collections. The training will be documented and filed by Monitoring Team Supervisor. The Monitoring Team Supervisor will also provide documentation of training to trainee, and trainee will be approved for physical habitat data collection until next SOP revision. This process will ensure comparability and accuracy of data used for water quality assessments, refinement of water quality standards and TMDL development. The training of staff will reduce systematic bias of measurements identified in the procedures of this SOP. Individuals who collect pebble count data will be required to complete a field replicate for the pebble count survey once during the field season to ensure consistency between data collectors and to determine repeatability of the pebble count procedure. The SWQB requires the pebble count replicate to be conducted by a different staff member and be completed the same day as the initial pebble count data collection event. The replicate will be used to assess for repeatability and consistency among data observers' measurements while controlling for temporal changes. An internal quality control goal set by the Bureau will be to be within +/- 10% of the D84 associated with replicant data collection events for the pebble count procedures.

Assurance of field data collection for physical habitat measurements are done through adherence to the process outlined in this SOP and oversight of the process by the QAO. If at any time the QAO determines this process is not being adhered to, the QAO has the authority to cease activities specific to this SOP with prior support and approval by the SWQB Bureau Chief and MASS Program Manager, until such a time that the issue can be resolved.

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9.0 Related Forms

Field Equipment Checklist Habitat

Laminated SOP and/or quick reference guides for physical habitat

Field Forms:

- Habitat and Biota Field Work Cover Sheet
- Pebble Count Field Form
- Cross Section, Thalweg Profile, and Large Woody Debris Form
- Bankfull Cross Section and Stream Flow Field Form
- Slope Field Form
- Percent Canopy Cover Field Form

10.0 Revision History

Revision 1. March 23, 2011 – Minor edits and clarification of language.

Revision 2. August 8, 2012 – Updated references. Updated SQUID upload procedures. Clarified pebble count, flow, slope, thalweg, and logistics protocols. Scouring event defined. Field forms clarified.

Revision 3. September 21, 2014 – Updated index period guidelines.
Jodey Kougioulis, QAO; Scott Murray, SME; Jeff Scarano, Program Manager

Revision 4. April 15, 2016 – Added quality control, data entry/management, SQUID geomorph/habitat event creation and excel upload instructions and general formatting.
Vacant, QAO; Seva Joseph, SME; Shelly Lemon, Program Manager

Revision 5. June 26, 2019 – The biological monitoring period has been extended to provide flexibility for sampling. Details were added to the Step-by-step Process Description section to provide precision to survey procedures for repeatability. The QA/QC section was updated with a new procedure for additional quality control for physical habitat measurements. Minor editorial changes; grammar, formatting and clarity throughout SOP.
Miguel Montoya, QAO; Chuck Dentino, SME; Kristopher Barrios, Program Manager

Revision 6. September 17, 2019 – Additional language was added to SOP which clarifies data collection by observer for different surveys and the pebble count data collection procedure. The QA/QC section was also revised and included updates to pebble replicate procedure and training requirements for physical habitat data collection. Minor grammatical editorial changes.
Miguel Montoya, QAO; Chuck Dentino, SME; Kristopher Barrios, Program Manager

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