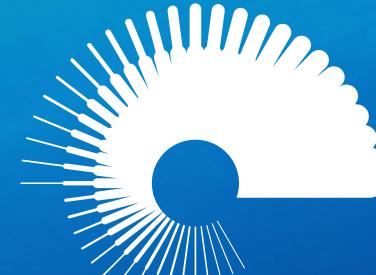




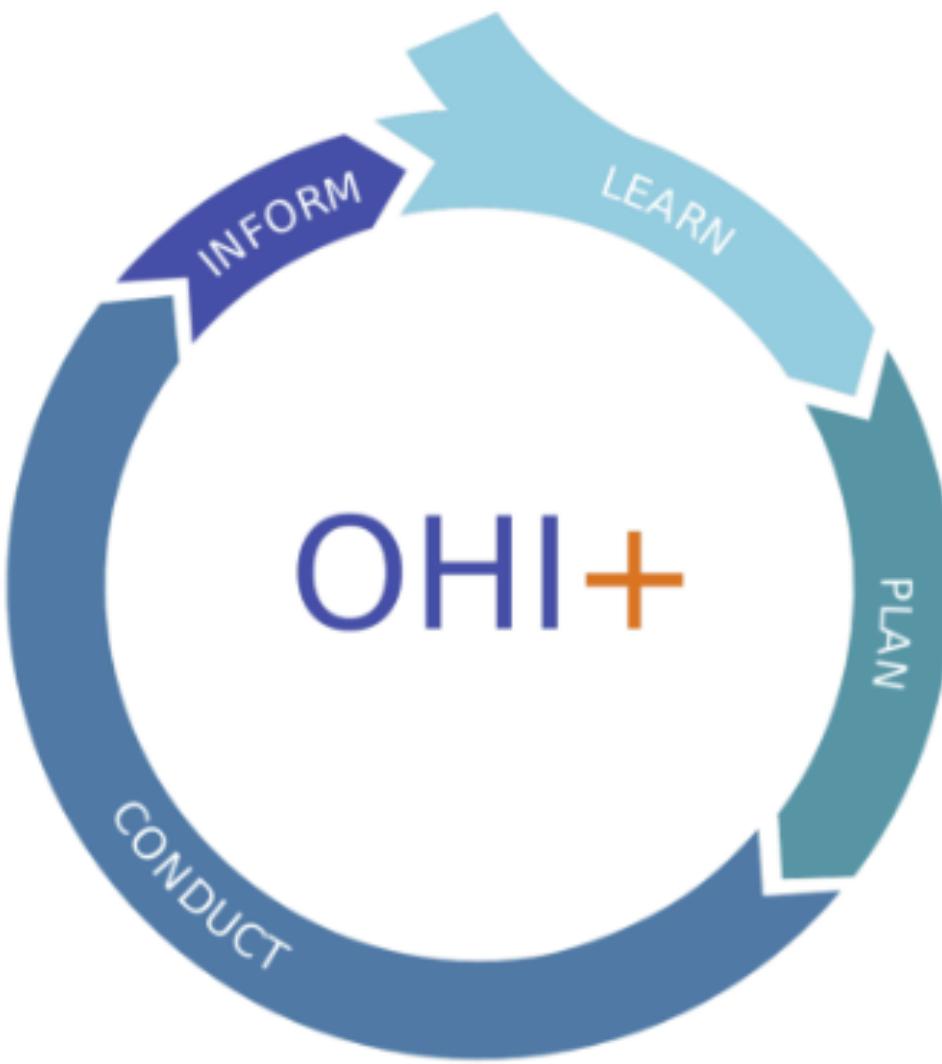
Updated Jan 2016. For updated information visit [ohi-science.org](http://ohi-science.org)

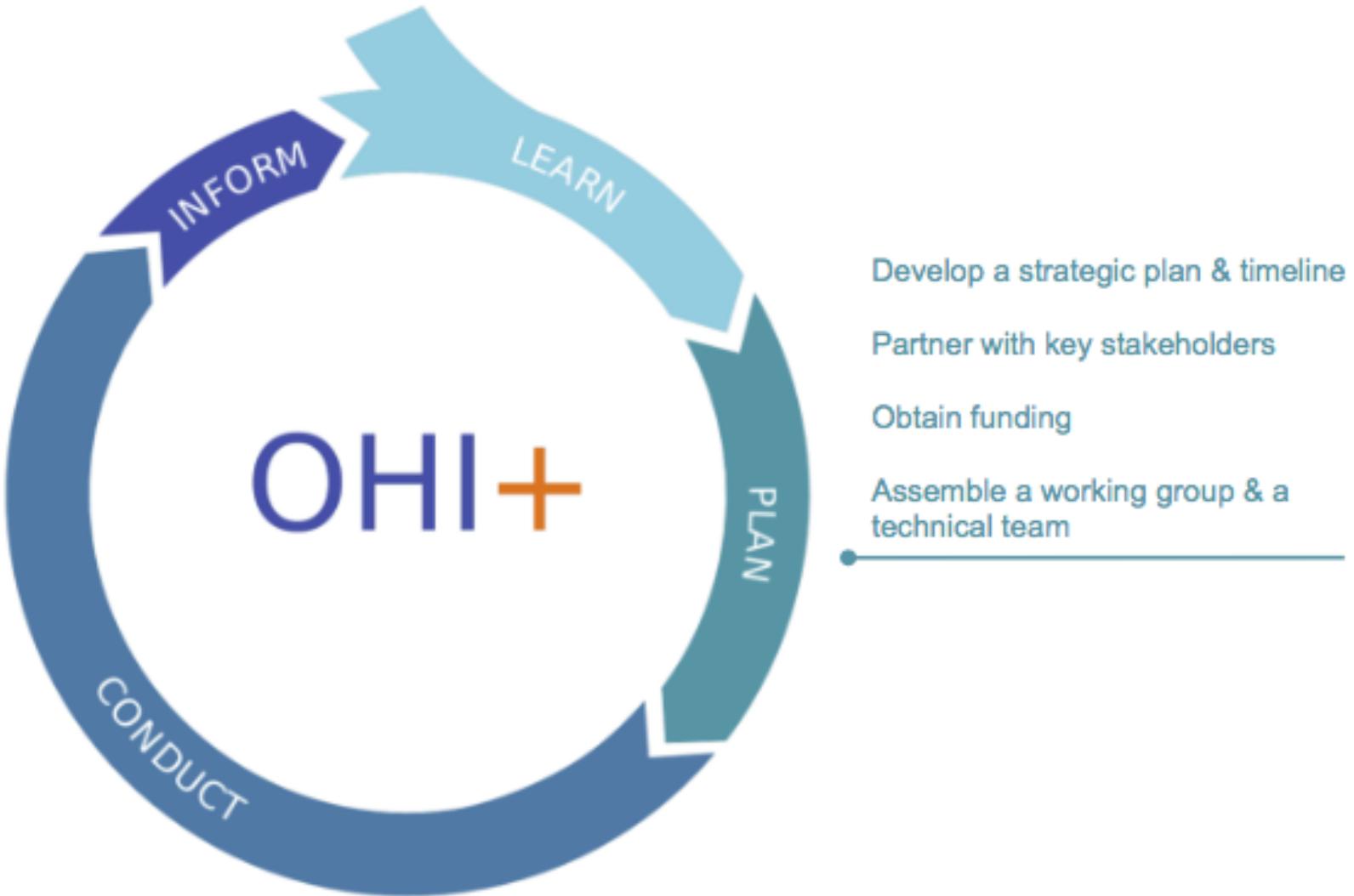


OCEAN  
HEALTH  
INDEX™  
+ = independent assessment

# Best Practices for Planning an Assessment

Updated Jan 2016. For updated information visit [ohi-science.org](http://ohi-science.org)





# OUTLINE



# OUTLINE

1. Assessment Requirements
2. Financial Planning
3. Data
4. Stakeholders & Partnering
5. Strategic Planning
6. Data & Model Considerations



# Planning an OHI+ Assessment

## Requirements

# **Planning an OHI+ Assessment**

**Requirements**

Funding

# Planning an OHI+ Assessment

## Requirements

Best available data

# Planning an OHI+ Assessment

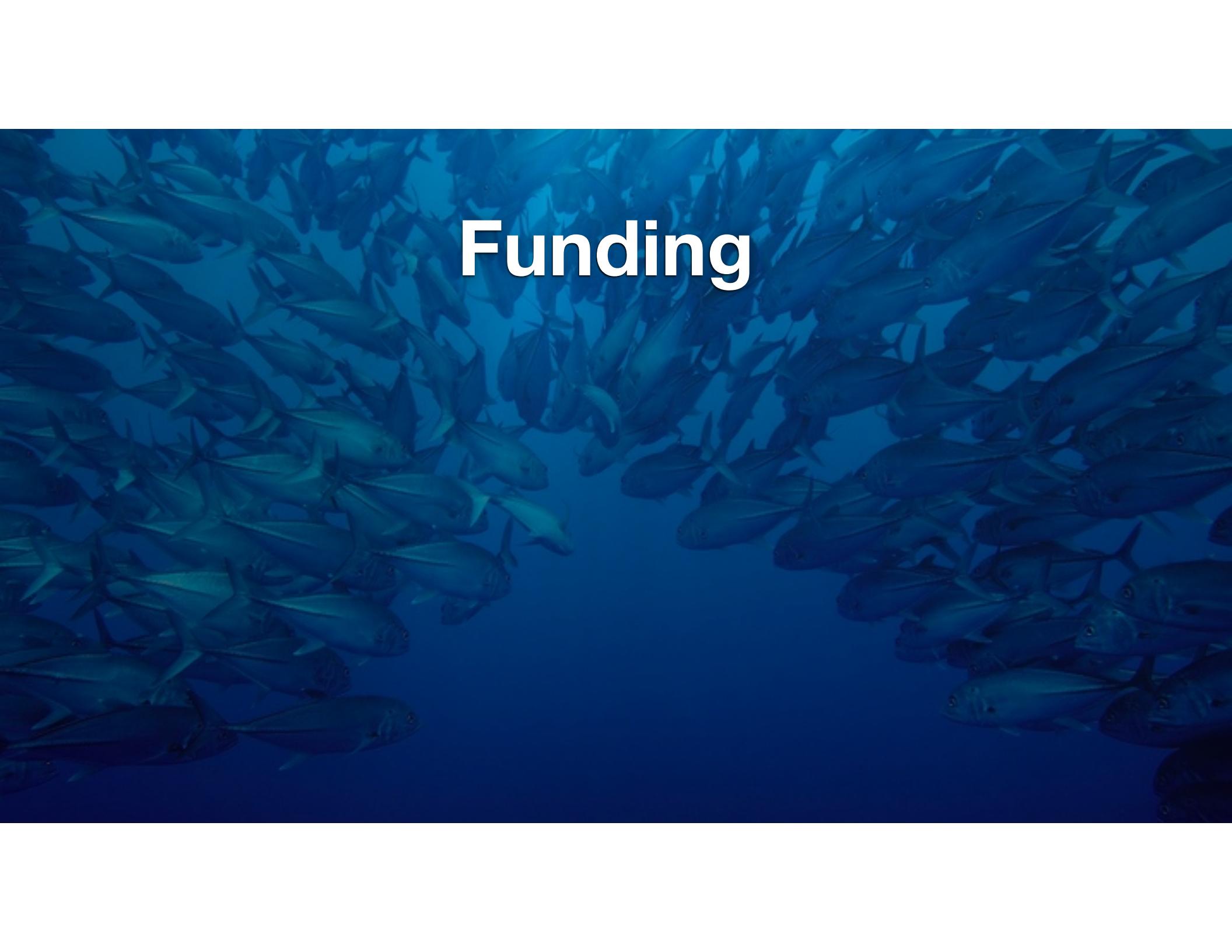
## Requirements

Identifying and engaging key stakeholders and partners

# Planning an OHI+ Assessment

## Requirements

Objectives and strategic planning

A large school of fish, likely jacks or tuna, swimming in a dense, dark blue ocean. The fish are silhouetted against a lighter blue background, creating a sense of depth and movement.

# Funding

# Funding

Funds needed for: team, workshops and meetings, communications, policy engagement, and operating costs

# Funding

Costs depend on the **local context**

# Funding

Follow a familiar planning process

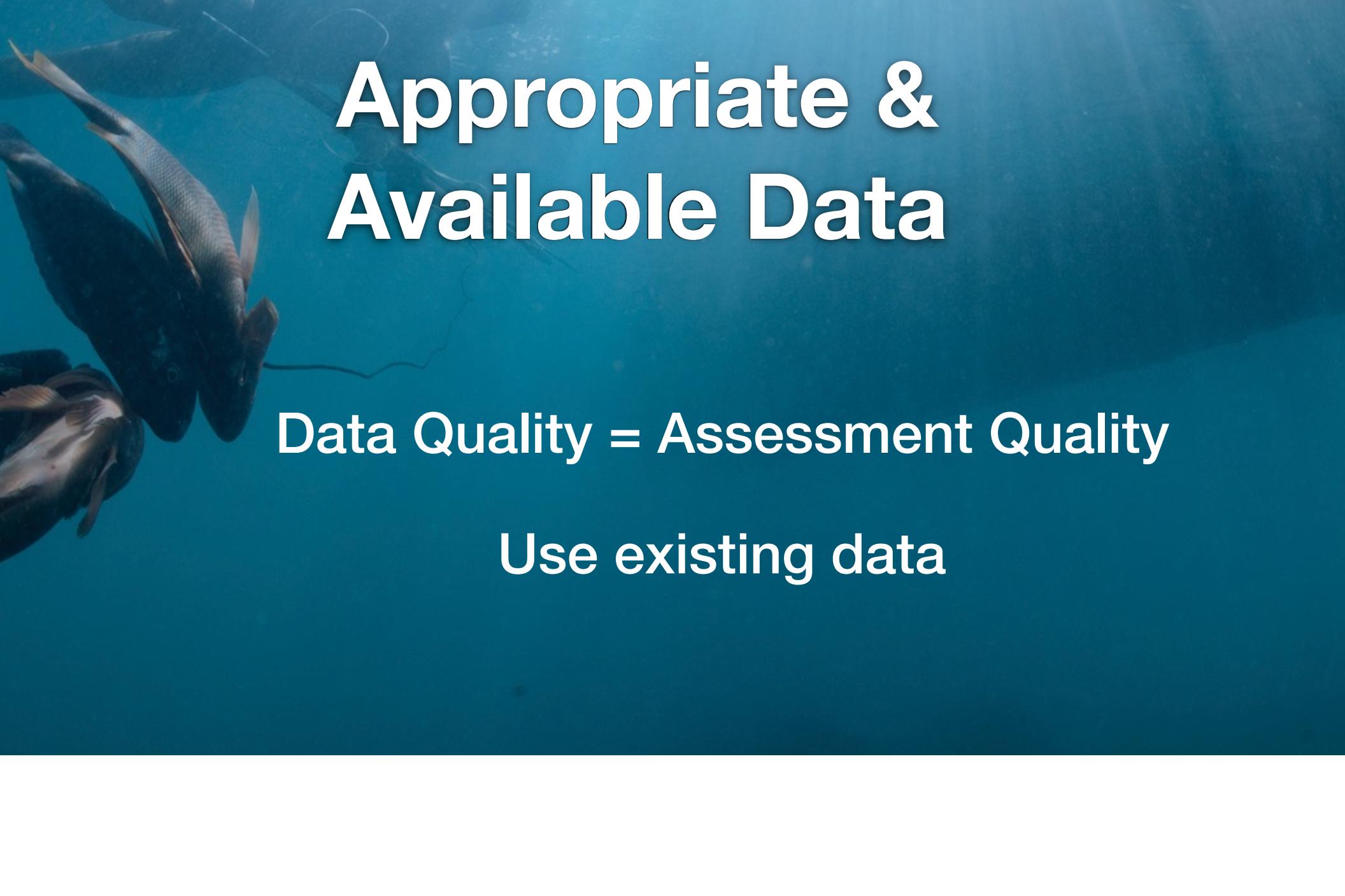
A photograph of a school of fish swimming in the ocean. The fish are silvery-grey with dark fins and tails, swimming in a dense cluster. The water is a deep teal color, and the lighting creates a sense of depth and movement.

# Appropriate & Available Data

A photograph of several fish swimming in the ocean. The fish are silvery-grey with dark fins and tails. They are shown from different angles, some facing left and some right, creating a sense of movement. The background is a deep blue-green color.

# Appropriate & Available Data

Data Quality = Assessment Quality

A photograph of a school of fish swimming in the ocean. The fish are silvery-grey with dark stripes and are moving in a coordinated, swirling pattern. The water is a deep teal color.

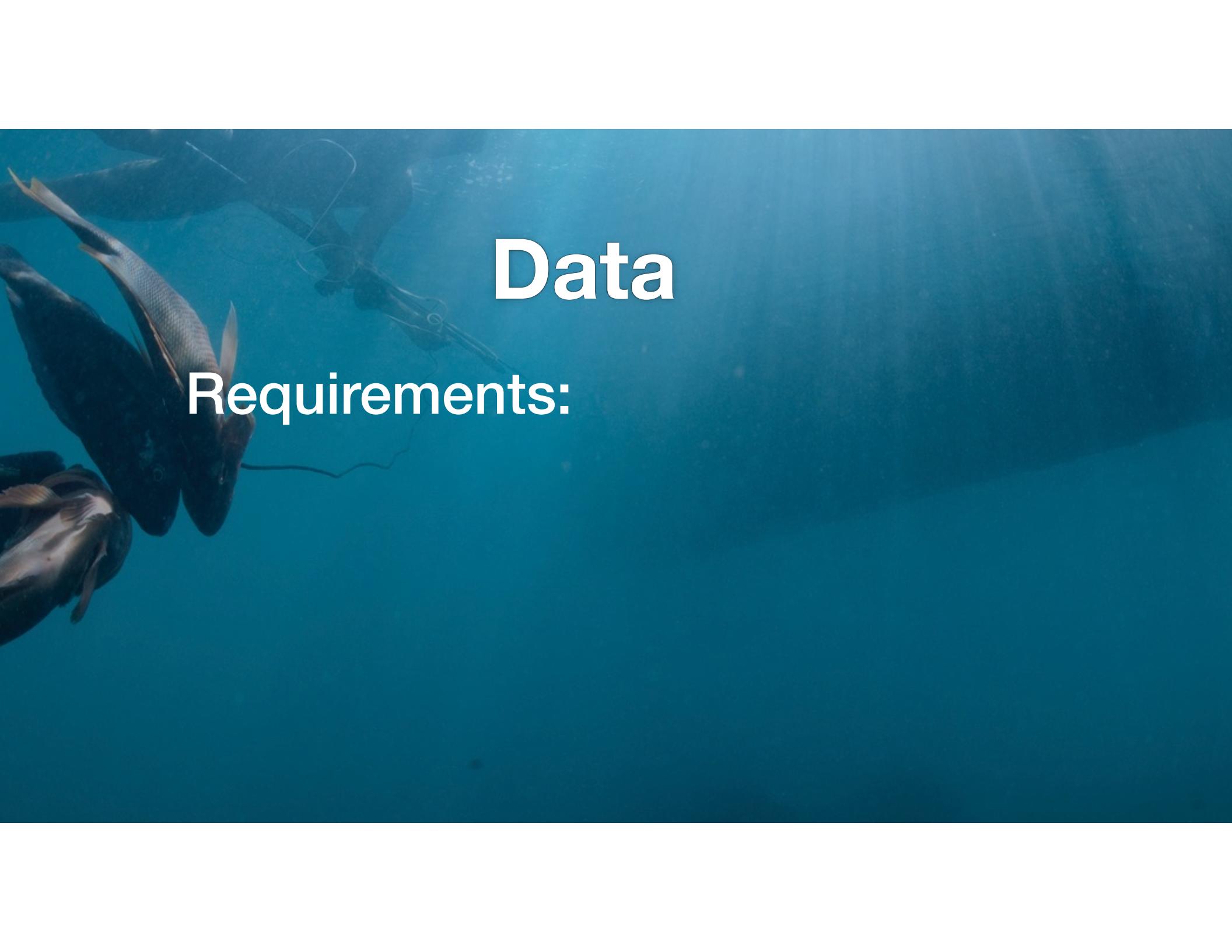
# Appropriate & Available Data

Data Quality = Assessment Quality

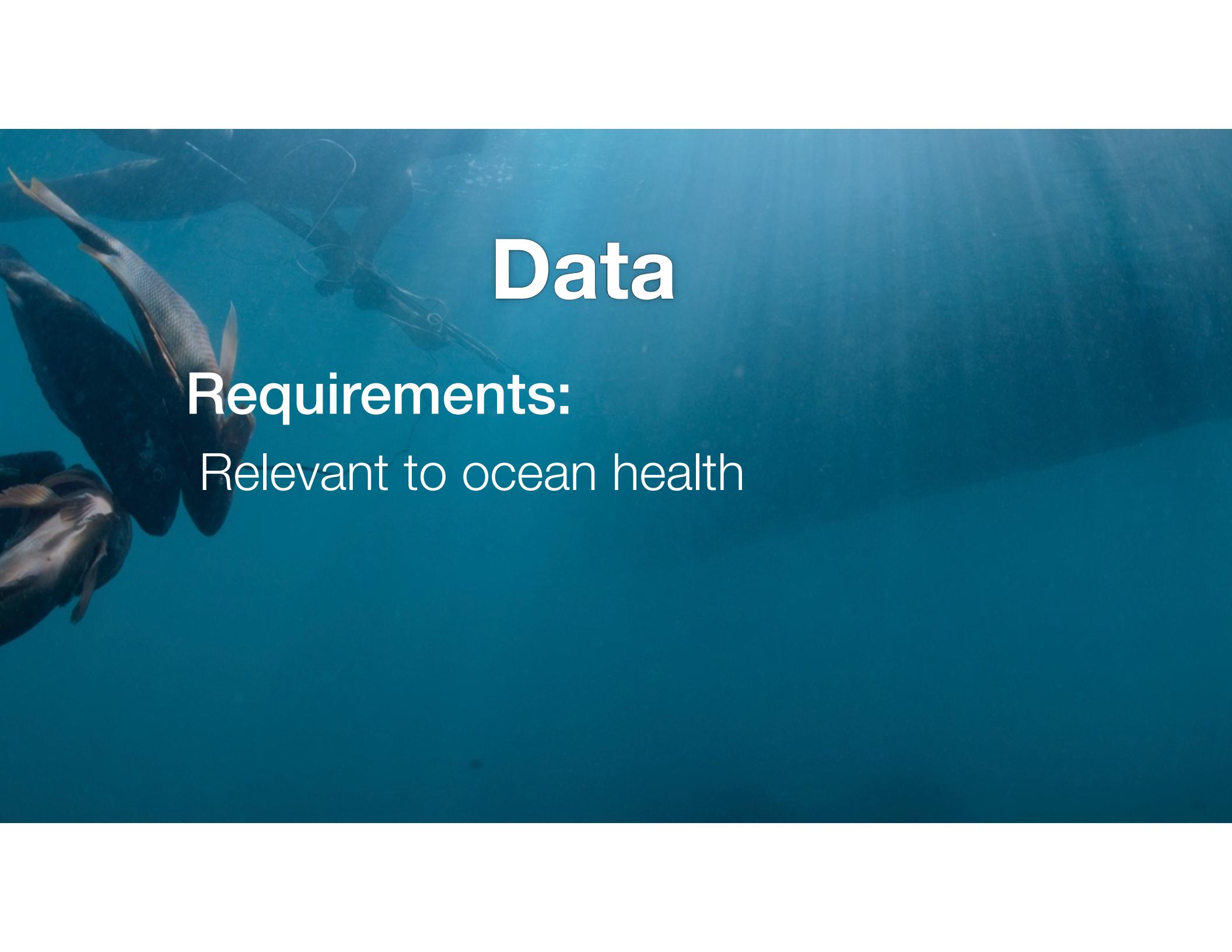
Use existing data

The background of the image is a deep, translucent blue, suggesting the depths of the ocean. A large school of fish is visible on the left side, swimming towards the right. The fish are dark-colored with some lighter, iridescent patches on their sides and fins. In the upper center, there is a faint, semi-transparent watermark or logo that appears to be a stylized 'G' or a similar letter inside a triangle. The overall composition is minimalist, with the text 'Data' positioned in the upper right quadrant.

# Data

The background of the slide features a photograph of a school of fish swimming in the ocean. The water is a deep teal color, and the fish are silhouetted against the light. Some fish are in sharp focus in the foreground, while others are blurred in the background.

# Data Requirements:

A photograph of an underwater scene. A scuba diver wearing a black wetsuit and fins is swimming towards the left. They are surrounded by several fish, including a large dark fish on the left and a smaller silver fish above them. The water is a deep teal color.

# Data

## Requirements:

Relevant to ocean health

A photograph of an underwater environment. In the foreground, several fish of different species are swimming. In the background, a scuba diver is visible, wearing a wetsuit and fins, holding a camera or a piece of equipment. The water is a deep teal color.

# Data

## Requirements:

Relevant to ocean health

Potential to establish a reference point

The background of the slide features an underwater scene with several fish swimming in the blue water. A scuba diver is visible in the center, wearing a tank and fins, swimming alongside the fish.

# Data

## Requirements:

Relevant to ocean health

Potential to establish a reference point

At the adequate/desired spatial scale

A photograph of an underwater scene. In the foreground, several fish of different species are swimming. In the background, a scuba diver wearing a wetsuit and fins is visible, swimming towards the camera. The water is a deep teal color.

# Data

## Requirements:

Relevant to ocean health

Potential to establish a reference point

At the adequate/desired spatial scale

At the adequate temporal scale

The background of the image is a deep, translucent blue, suggesting the depths of the ocean. A large school of fish is visible on the left side, swimming towards the right. The fish are dark-colored with some lighter, iridescent patches on their sides and fins. In the upper center, there is a faint, semi-transparent watermark or logo that appears to be a stylized 'G' or a similar letter inside a triangle. The overall composition is minimalist, with the text 'Data' positioned in the upper right quadrant.

# Data

# Data

Goal Status (environmental, social, and economic indicators)

A photograph of an underwater scene. A scuba diver is visible in the center-left, wearing a full diving suit and mask. They are swimming through a large school of fish, which appear dark against the bright blue water. Sunlight filters down from the surface, creating a bright glow around the diver and the fish.

# Data

Pressures (Ecological and Social)

A large school of fish, possibly jackfish, is swimming in a dark blue ocean. In the upper left, a scuba diver is visible, holding a camera and filming the fish. The water has a slight greenish tint.

# Data

Resilience (Ecological and Social)

A photograph of a school of fish swimming in the ocean. The fish are silvery with dark fins and tails, moving in a coordinated, flowing pattern. The water is a deep teal color, and the lighting creates a sense of depth and movement.

# Data

Time series for data layers (5 years)

The background of the image is a deep, translucent blue, suggesting the depths of the ocean. A large school of fish is visible on the left side, swimming towards the right. The fish are dark-colored with some lighter, iridescent patches on their sides and fins. In the upper center, there is a faint, semi-transparent watermark or logo that appears to be a stylized 'G' or a similar letter inside a triangle. The overall composition is minimalist, with the text 'Data' positioned in the upper right quadrant.

# Data

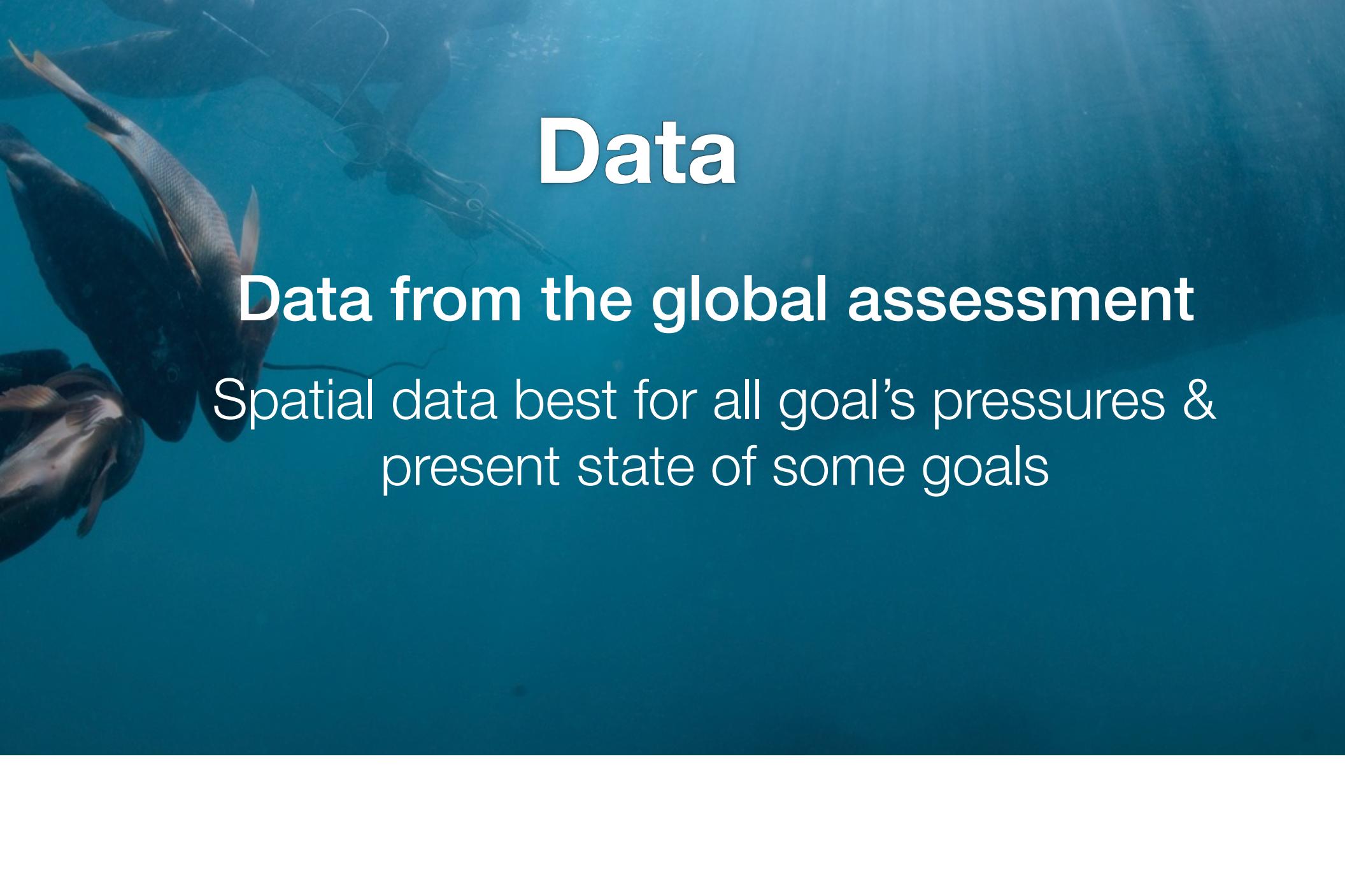
The background image shows a large school of fish swimming in a deep blue ocean. The fish are silhouetted against the bright light from above, creating a dramatic effect. Some fish are in sharp focus in the foreground, while others are blurred in the background.

# Data

A photograph of a school of fish swimming in the ocean. The water is a deep teal color. In the upper left corner, several fish are visible, their bodies silhouetted against the light. One fish in the foreground has a distinct yellow stripe along its side. The background is darker, suggesting depth.

# Data

## Data from the global assessment

A photograph of an underwater scene. A scuba diver wearing a black wetsuit and fins is swimming towards the right. They are surrounded by several fish, including a large dark fish on the left and a smaller silver fish below them. The water is a deep teal color.

# Data

**Data from the global assessment**

Spatial data best for all goal's pressures & present state of some goals

A photograph of an underwater scene. In the foreground, several fish are swimming, their bodies silhouetted against the bright water. In the background, a scuba diver is visible, wearing a tank and fins, swimming towards the camera. The water is a deep teal color.

# Data

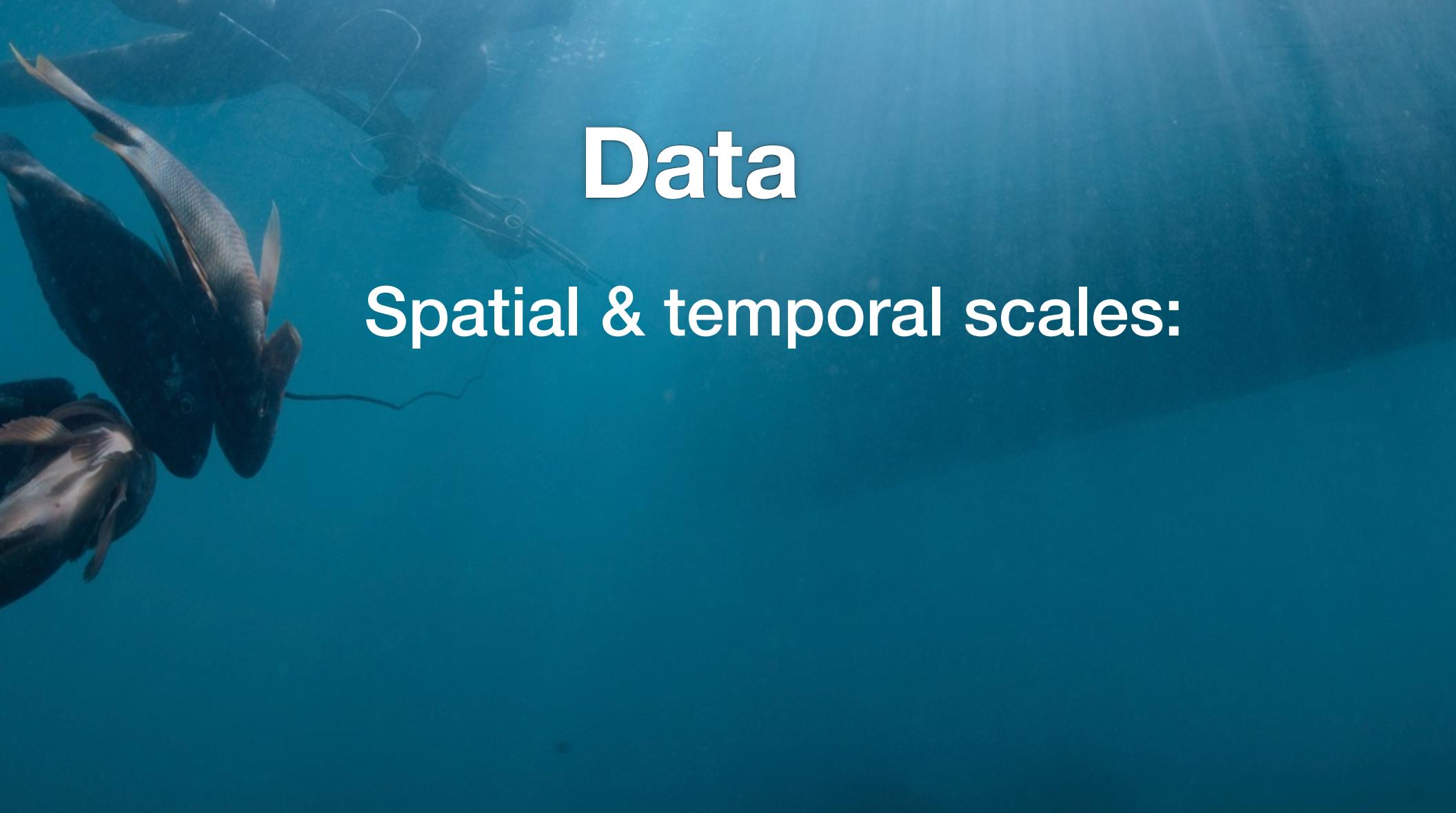
**Data from the global assessment**

Spatial data best for all goal's pressures & present state of some goals

Local data best for present state, trends of most goals, and resilience for all goals

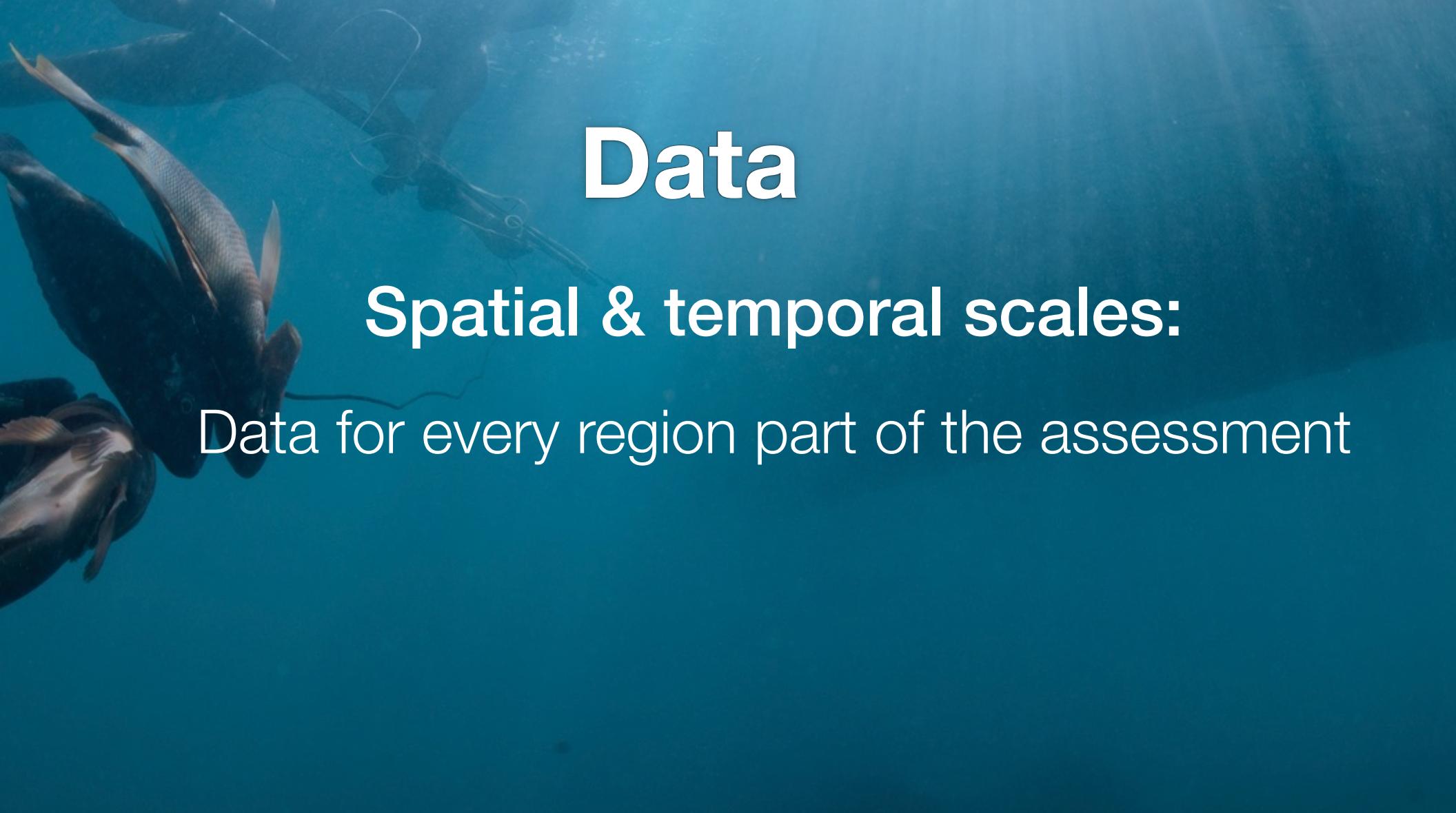
The background image shows a large school of fish swimming in a deep blue ocean. The fish are silhouetted against the bright light from above, creating a dramatic effect. Some fish are in sharp focus in the foreground, while others are blurred in the background.

# Data

A photograph of a school of fish swimming in the ocean. The water is a deep teal color. In the upper left corner, several fish are visible, their bodies silhouetted against the light. One fish in the foreground has a distinct yellow stripe along its side. In the background, a scuba diver is partially visible, wearing a wetsuit and fins, holding a camera or a net. The overall scene is a mix of natural marine life and human activity.

# Data

Spatial & temporal scales:

A photograph of a school of fish swimming in the ocean. The fish are silvery with dark stripes and are moving towards the left. The water is a deep teal color.

# Data

**Spatial & temporal scales:**

Data for every region part of the assessment

A photograph of an underwater scene. In the foreground, several fish of different species are swimming. In the background, a scuba diver wearing a mask and fins is visible, swimming towards the camera. The water is a deep teal color.

# Data

**Spatial & temporal scales:**

Data for every region part of the assessment

Data for all elements for at least five years —  
for trend (33% of score)

# Establishing Reference Points



# Establishing Reference Points

Indicates a score of 100, so goal scores are comparable. Based on:

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Indicates a score of 100, so goal scores are comparable. Based on:

Data availability (spatial, temporal, functional)

# Establishing Reference Points

Indicates a score of 100, so goal scores are comparable. Based on:

Data availability (spatial, temporal, functional)

Management/Policy targets (established)

# Establishing Reference Points



# Establishing Reference Points

Informed choices – highly subjective

# Establishing Reference Points

Informed choices – highly subjective

Important that decisions are transparent  
and based on the best information  
available

# Establishing Reference Points



# Establishing Reference Points

*Who to involve in the assessment process and how?*

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Stakeholder analysis

# Establishing Reference Points

*Who to involve in the assessment process and how?*



Stakeholder analysis

Establish strong multi-disciplinary management  
and leadership framework

# Establishing Reference Points

*Who to involve in the assessment process and how?*



Stakeholder analysis

Integrated management more successful when  
collaborating in a multi-stakeholder team

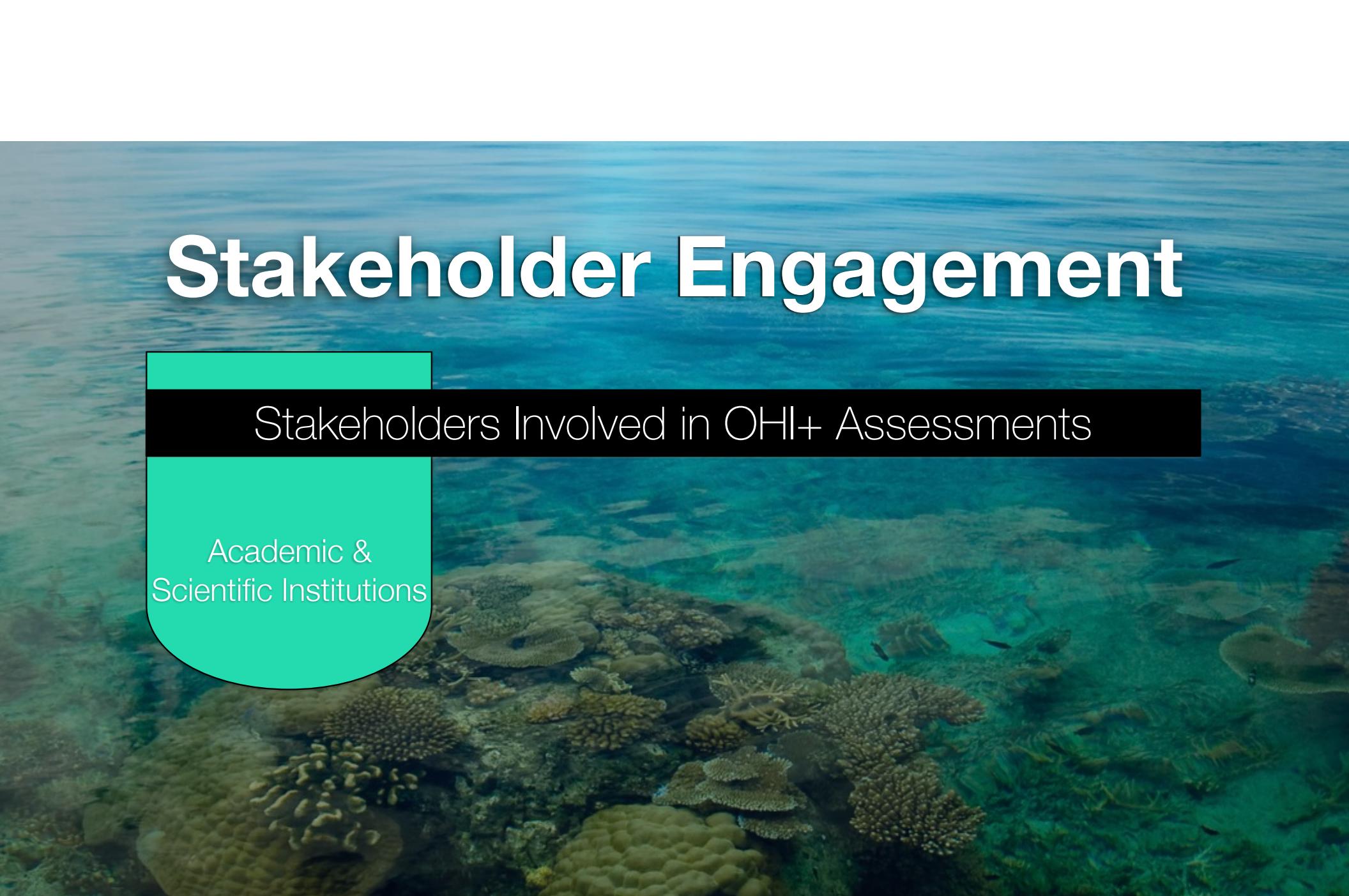
# Stakeholder Engagement

Stakeholders Involved in OHI+ Assessments

# Stakeholder Engagement

Stakeholders Involved in OHI+ Assessments

Academic &  
Scientific Institutions



# Stakeholder Engagement

Stakeholders Involved in OHI+ Assessments

Academic &  
Scientific Institutions

NGOs, civil society,  
and private sector

# Stakeholder Engagement

## Stakeholders Involved in OHI+ Assessments

Academic &  
Scientific Institutions

NGOs, civil society,  
and private sector

Government  
agencies and  
decision makers

# Stakeholder Engagement

## Stakeholders Involved in OHI+ Assessments

Academic &  
Scientific Institutions

NGOs, civil society,  
and private sector

Government  
agencies and  
decision makers

Working group + Technical Team

# Team Structure

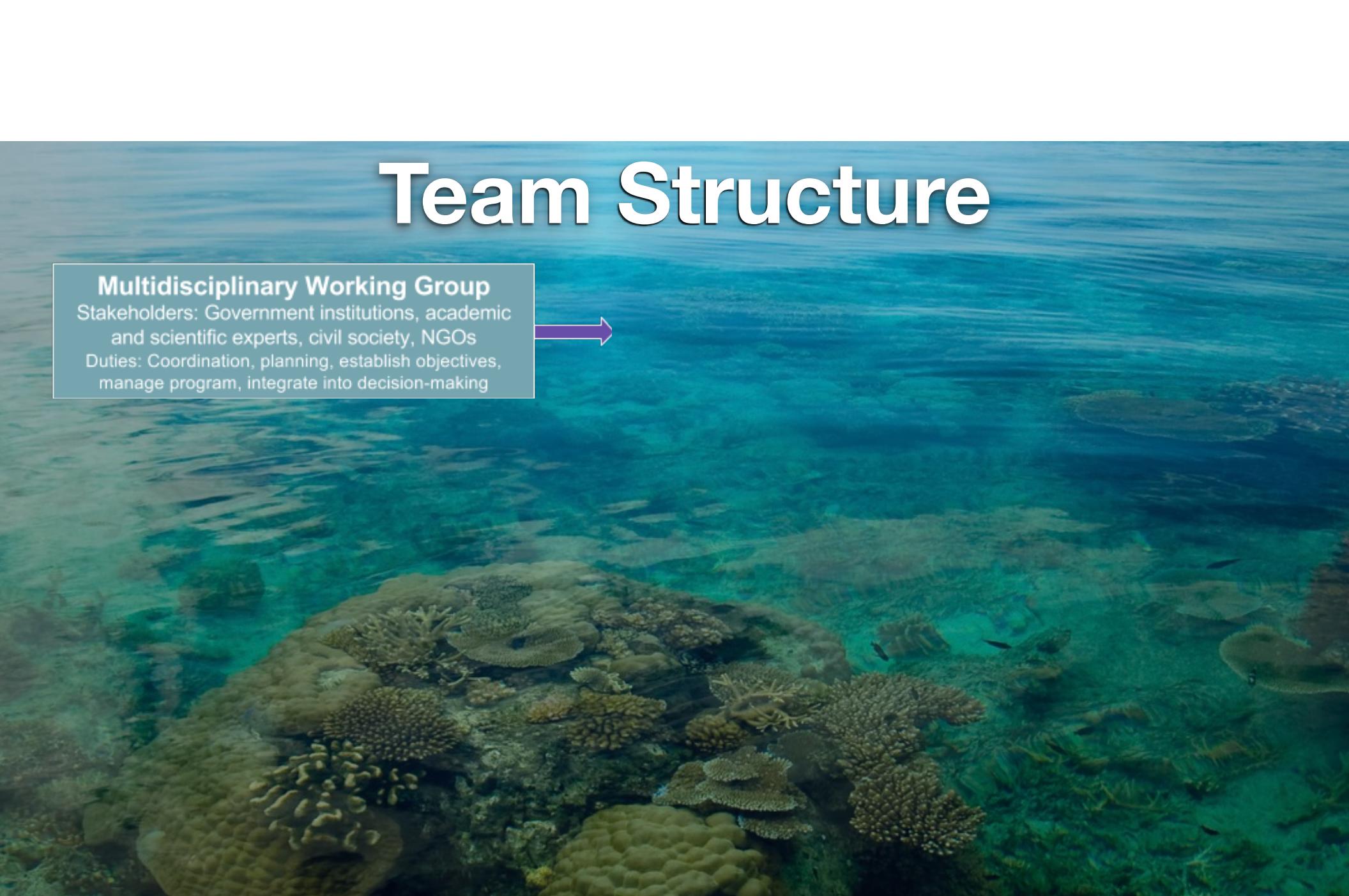
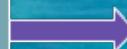


# Team Structure

## Multidisciplinary Working Group

Stakeholders: Government institutions, academic and scientific experts, civil society, NGOs

Duties: Coordination, planning, establish objectives, manage program, integrate into decision-making



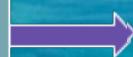
# Team Structure

## Multidisciplinary Working Group

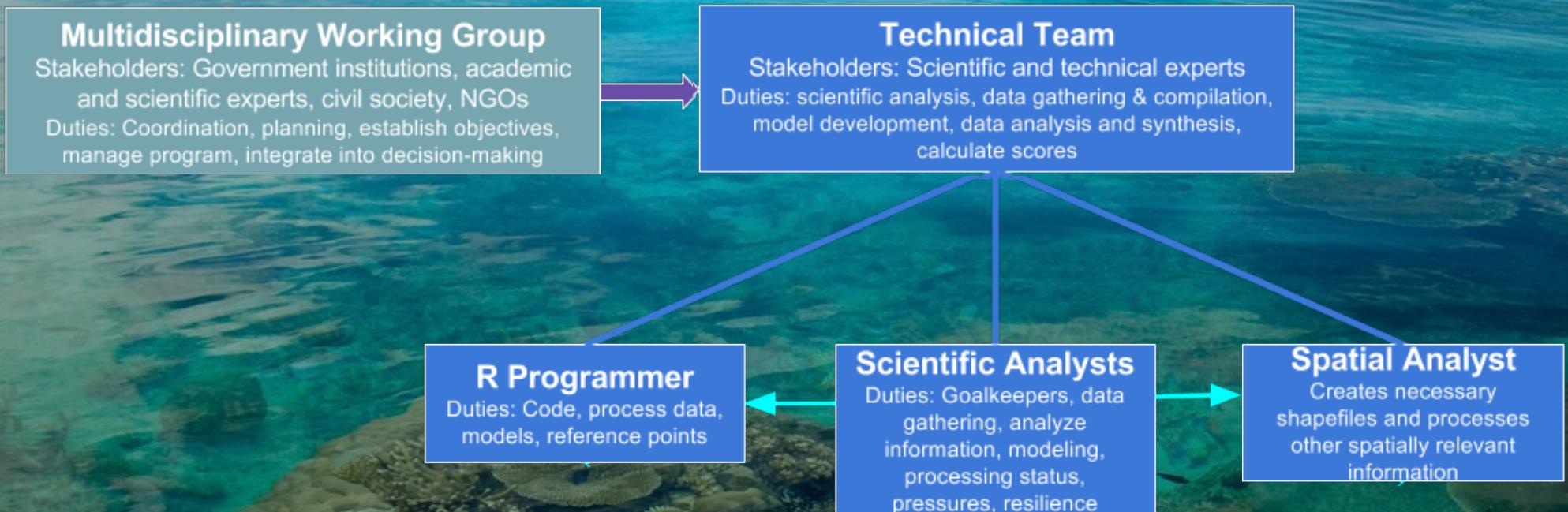
Stakeholders: Government institutions, academic and scientific experts, civil society, NGOs  
Duties: Coordination, planning, establish objectives, manage program, integrate into decision-making

## Technical Team

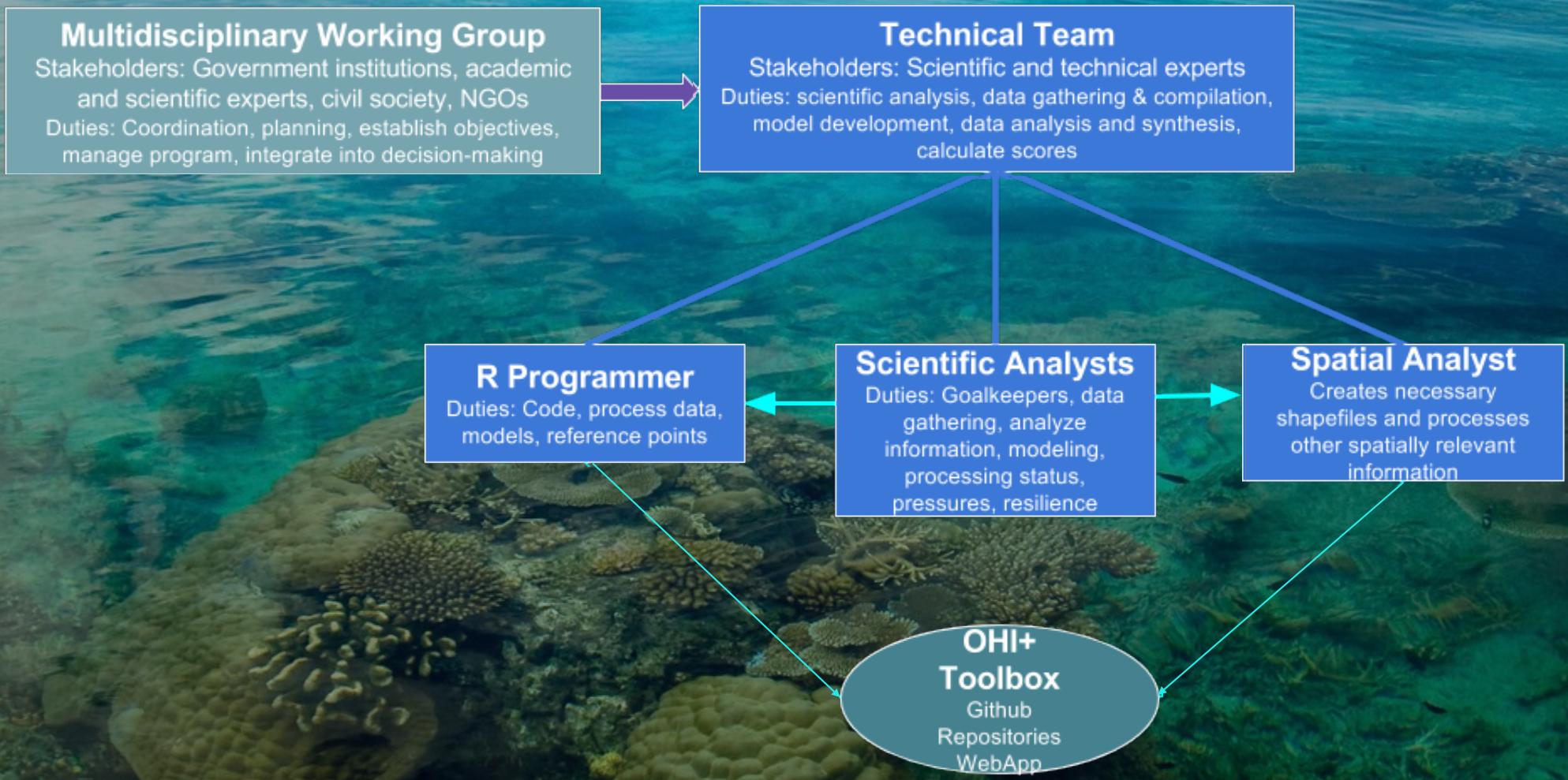
Stakeholders: Scientific and technical experts  
Duties: scientific analysis, data gathering & compilation, model development, data analysis and synthesis, calculate scores



# Team Structure



# Team Structure



# Strategic Planning





# Strategic Planning

*What is the purpose and goal of the assessment?*

# Strategic Planning

*What is the purpose and goal of the assessment?*

Determine the **scope** and **objectives** of your assessment

# Strategic Planning

*What is the purpose and goal of the assessment?*

Determine the **scope** and **objectives** of your assessment

- Social, political, ecological, economic, and governance criteria

A close-up photograph of an octopus's tentacle, showing its characteristic抽搐 (tentacles) and suckers. The tentacle is primarily blue and orange, blending with the surrounding coral reef. The background consists of various coral species, creating a textured, underwater scene.

# Strategic Planning

*What is the purpose and goal of the assessment?*

Identify **key components** and establish a **timeline**

# Strategic Planning



# Strategic Planning

Incorporate **key characteristics and priorities** into the assessment framework design before gathering information

# Strategic Planning

Include broad ocean benefits and key characteristics reflecting social values and priorities

# Strategic Planning

Appropriate strategy to the **local context**

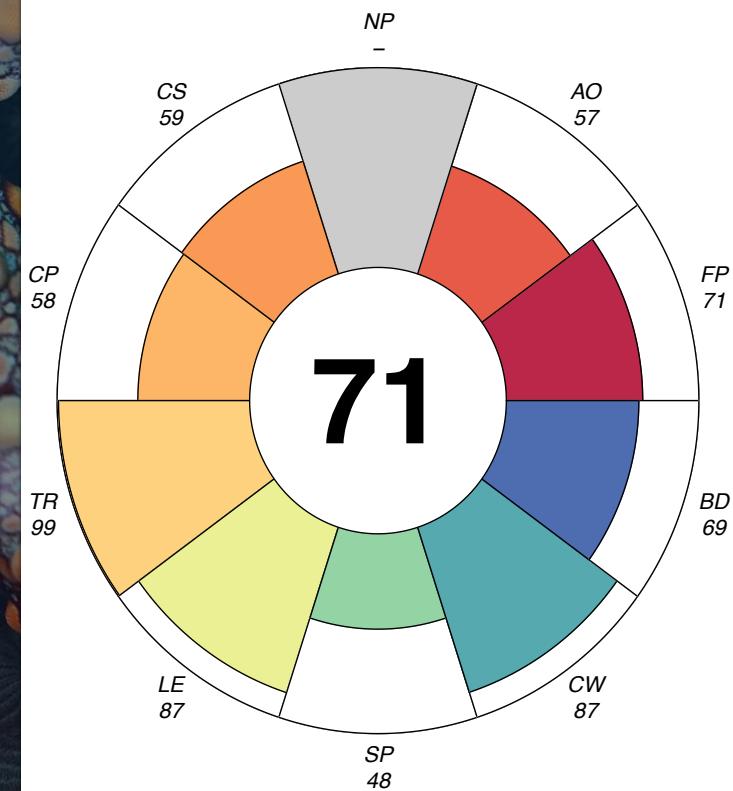
# Decisions About the Goals



# Decisions About the Goals

Should all goals be included?

**U.S. West Coast Assessment**

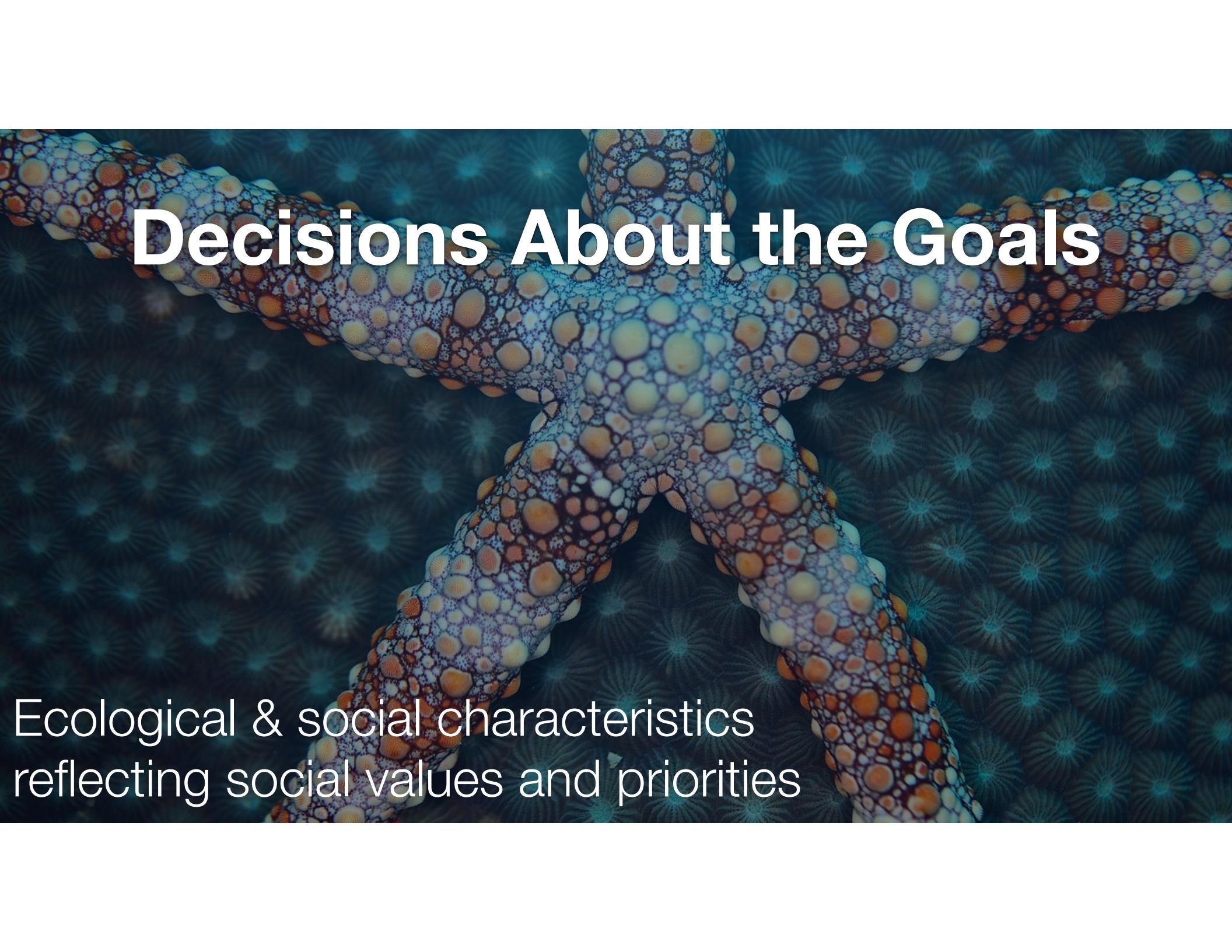


# Decisions About the Goals

Decisions about goal weighting

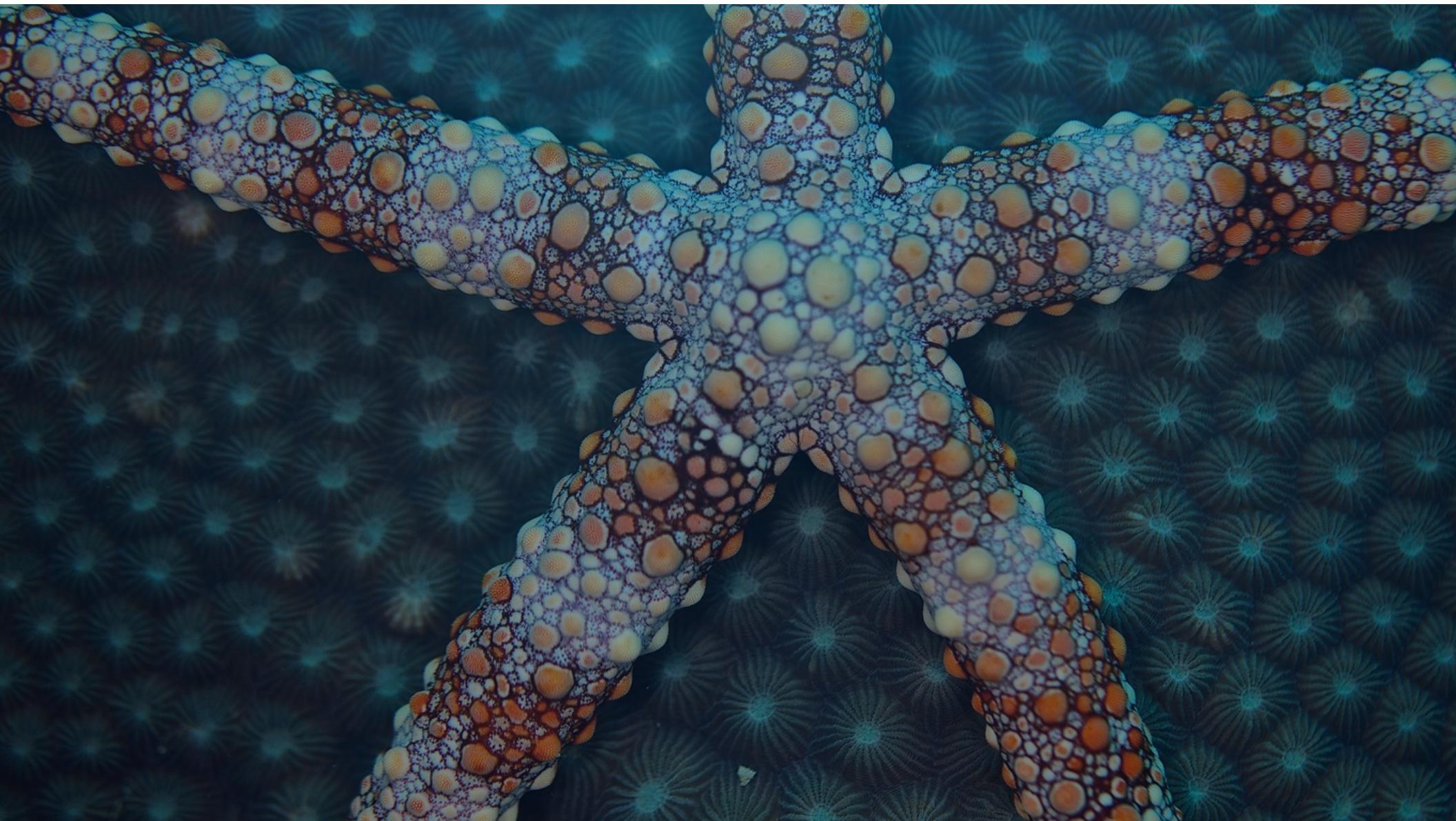
# Decisions About the Goals

Consider and categorize local pressures and resilience



# Decisions About the Goals

Ecological & social characteristics  
reflecting social values and priorities



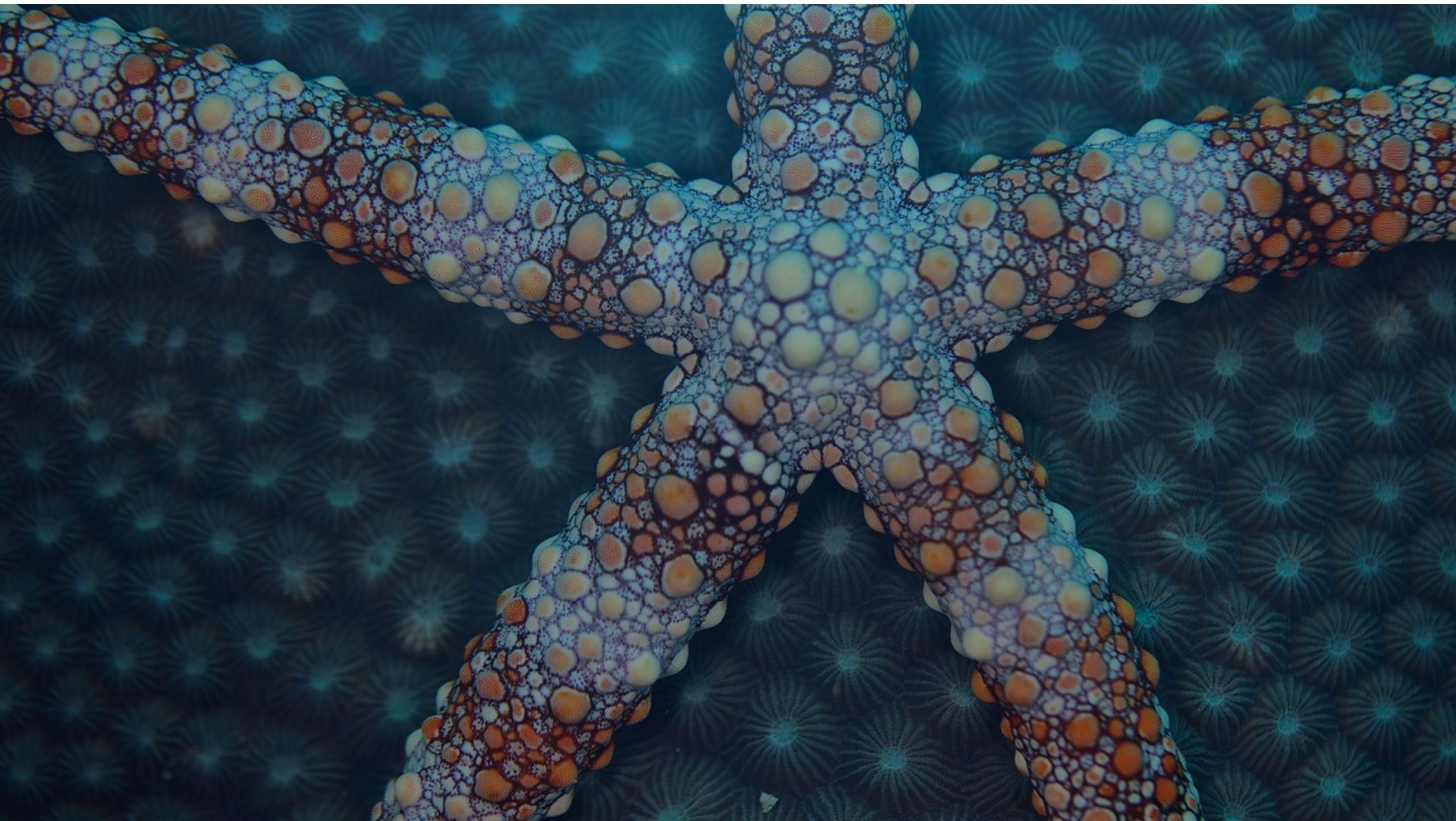
# Which spatial scales should be assessed?

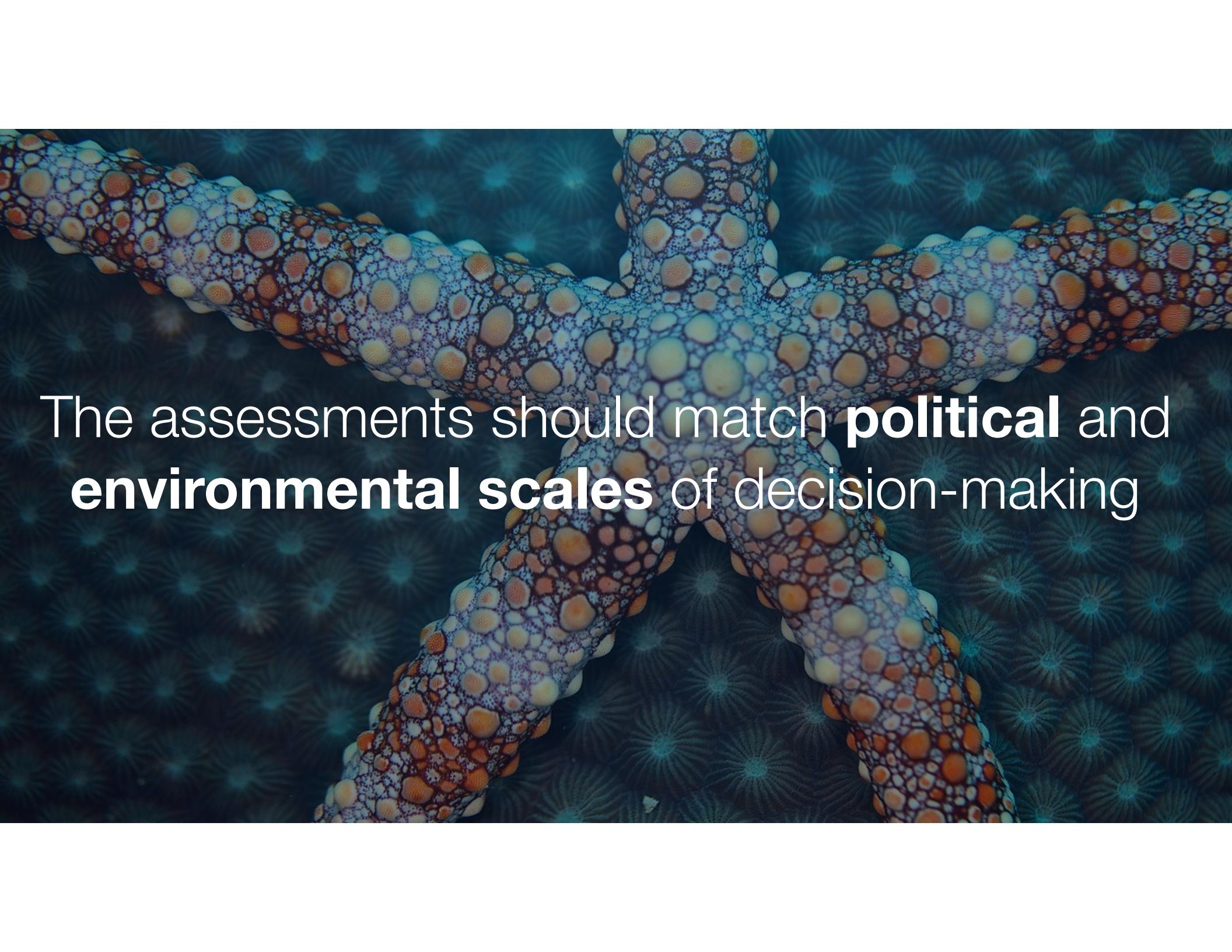


# Which spatial scales should be assessed?



Explicitly define spatial extent of the study area and unique (non-overlapping) locations within



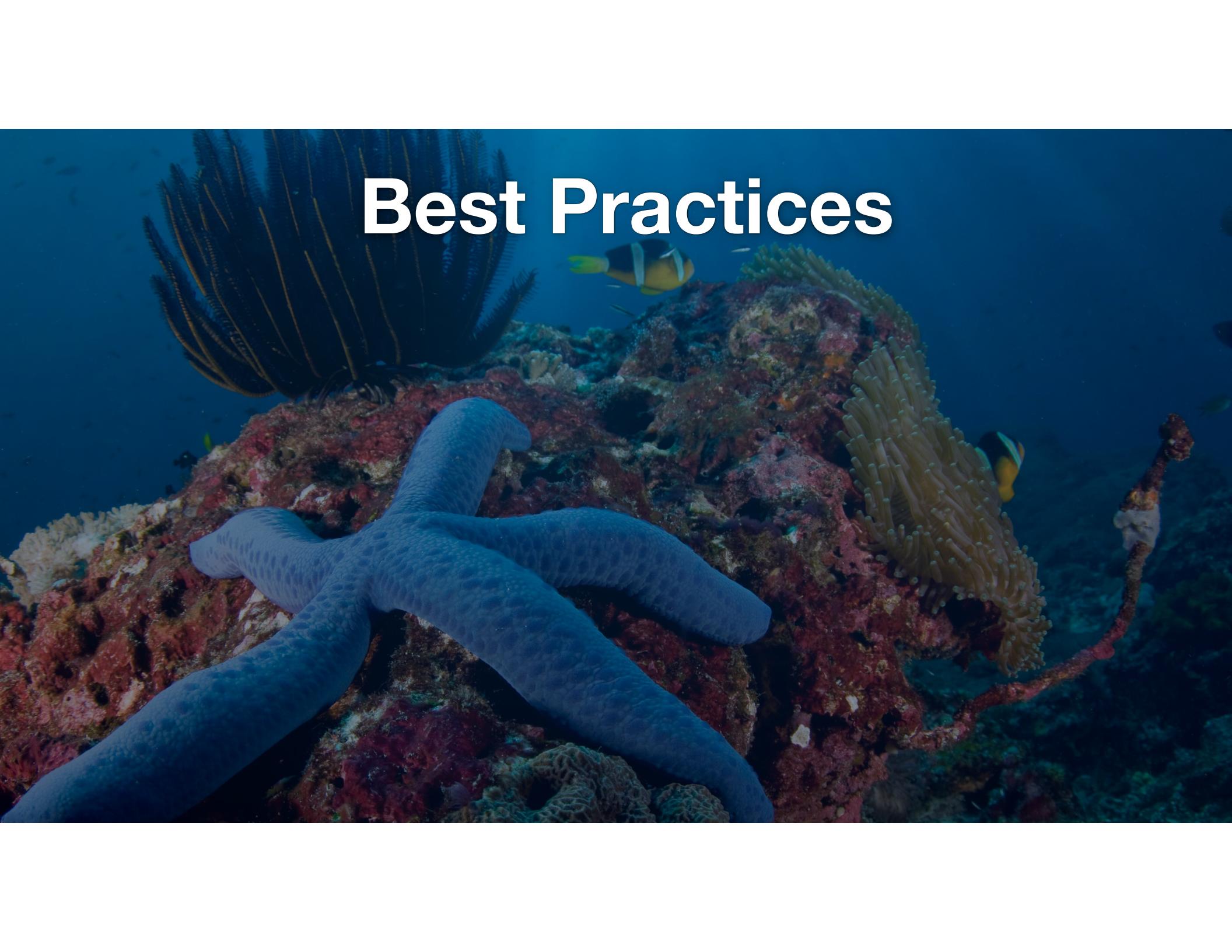


The assessments should match **political** and  
**environmental scales** of decision-making



Data availability can help determine spatial scales to assess

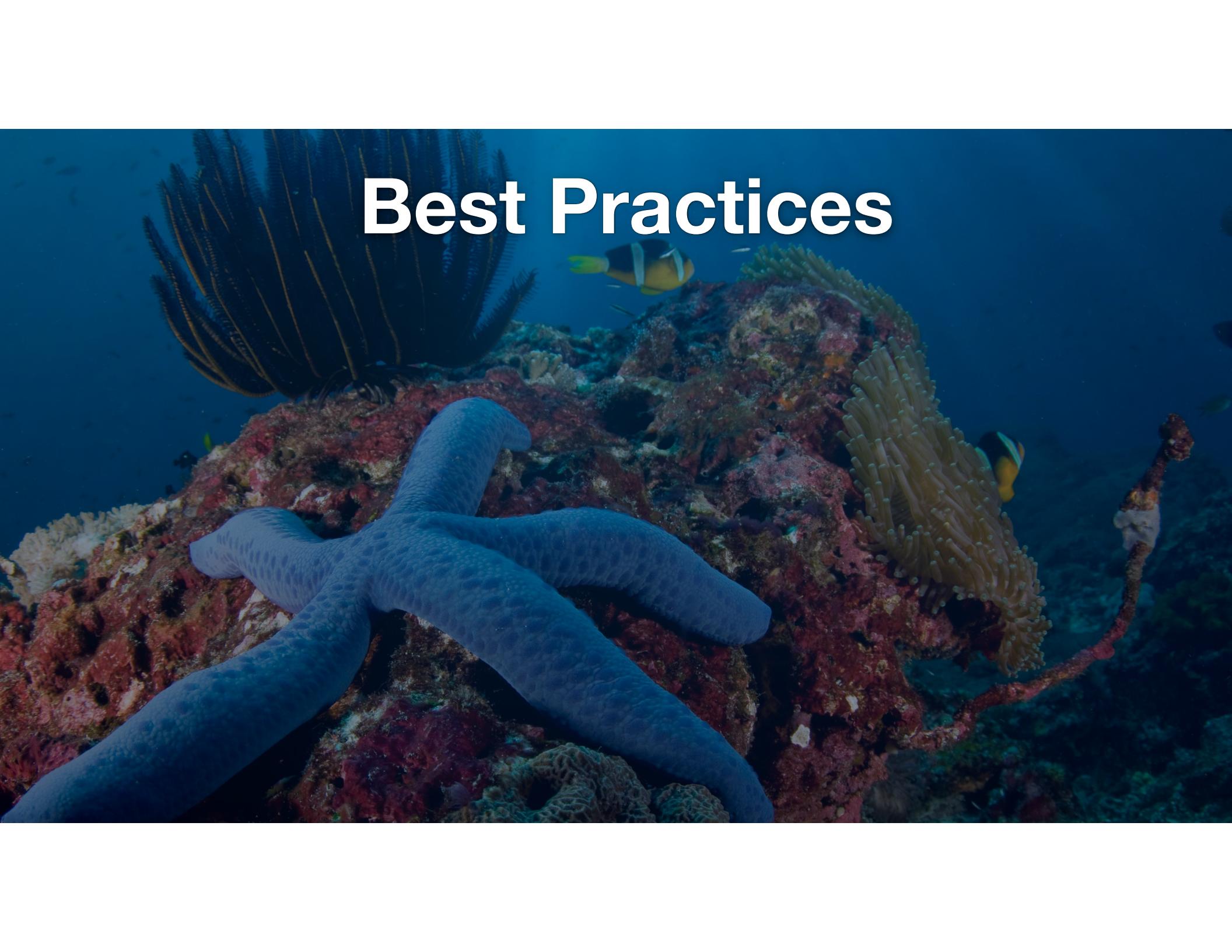
# Best Practices

A vibrant underwater photograph of a coral reef. In the foreground, a large, textured blue sea fan stands upright. To its right, a bright orange and white clownfish swims near a large, fluffy anemone with many tentacles. The background features a variety of colorful corals in shades of red, pink, and purple, with sunlight filtering down from the surface.

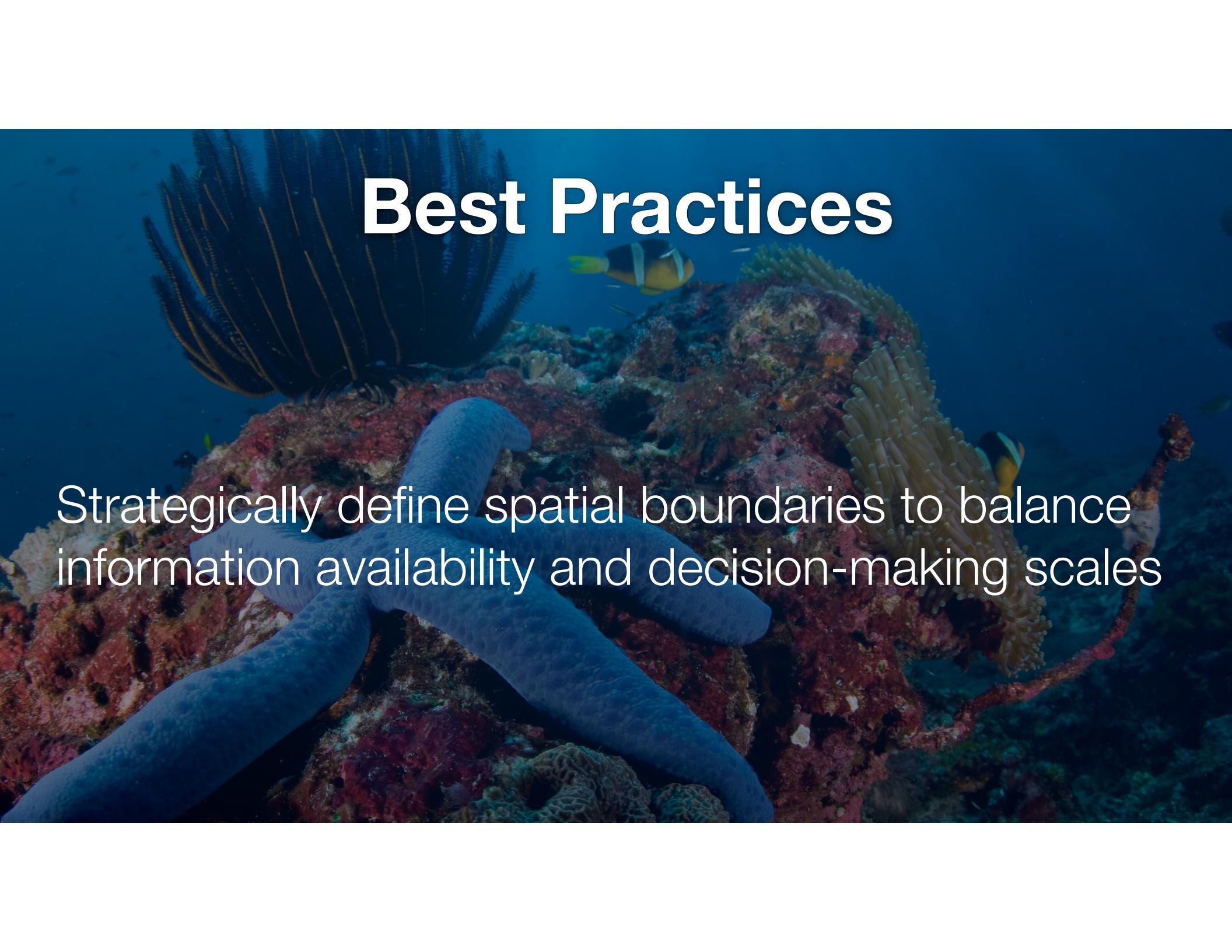
# Best Practices

Maintain the **key characteristics** and **priorities** of the assessment framework design regardless of information limitations

# Best Practices

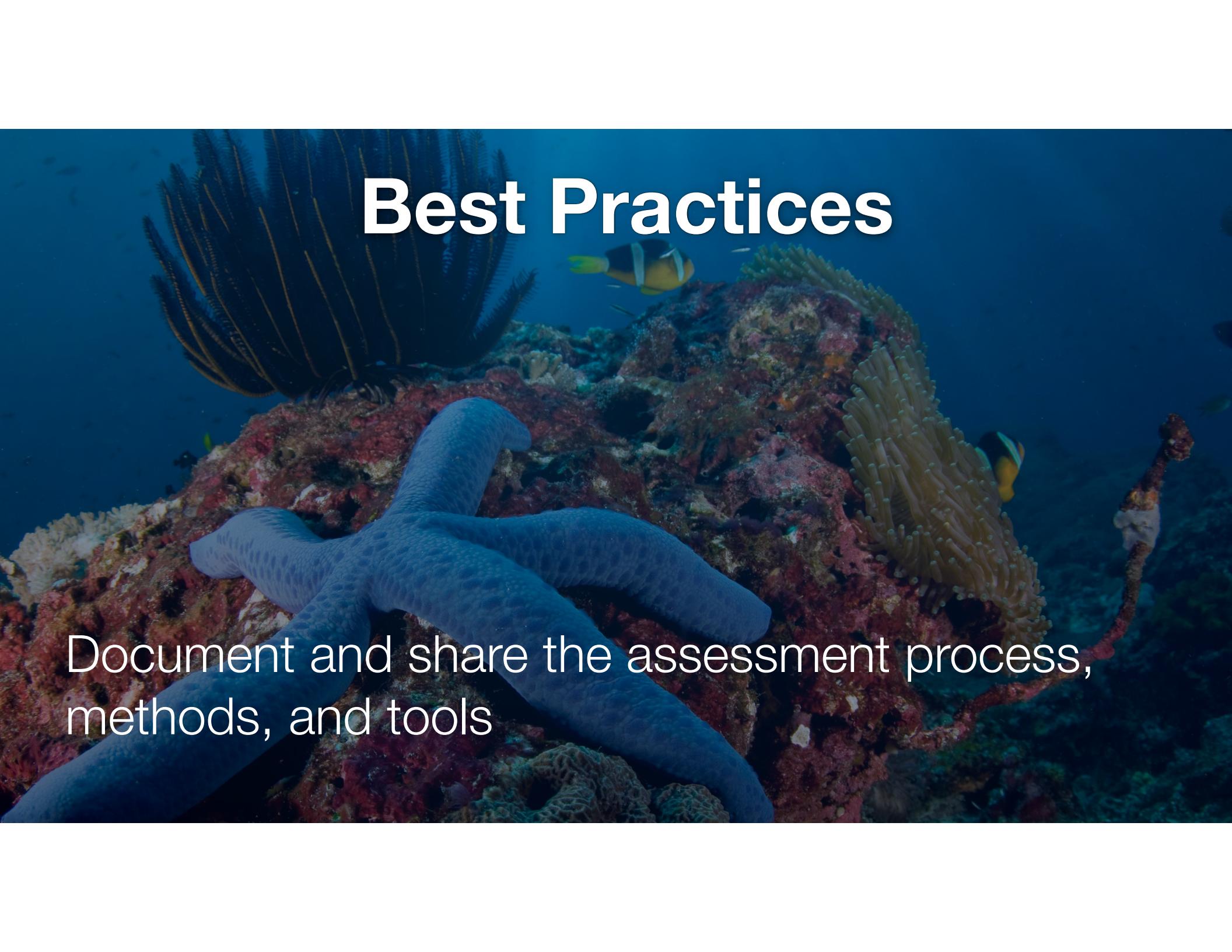
A vibrant underwater photograph of a coral reef. In the foreground, a large, textured blue sea fan stands upright. To its right, a bright orange and white clownfish swims near a large, fluffy anemone with many tentacles. The background features a variety of colorful corals in shades of red, pink, and purple, with sunlight filtering down from the surface.

# Best Practices

A vibrant underwater photograph of a coral reef. In the foreground, a large, blue, textured nudibranch (sea slug) crawls across the reef. Behind it, a large, dark, branching sea fan with yellow stripes extends upwards. Several clownfish, with their characteristic orange and white stripes, are swimming around the reef. The background is a deep blue, and the overall scene is rich in marine biodiversity.

Strategically define spatial boundaries to balance information availability and decision-making scales

# Best Practices

A vibrant underwater photograph of a coral reef. A large, blue, textured nudibranch (sea slug) is the central focus, crawling across the reef. In the background, a bright orange and white clownfish swims near a large, green, anemone. To the left, a large, dark brown sea fan with yellow stripes extends upwards. The reef is composed of various colorful corals and rocks, set against a deep blue ocean.

Document and share the assessment process,  
methods, and tools

# Data & Models Considerations

The background of the slide features a photograph of a school of blue fish swimming in a dark, textured environment, likely coral reefs or rocks, under water.

Is local data  
available?

# Data & Models Considerations

Is local data available?

yes

Could a new model be developed?

# Data & Models Considerations

Is local data available?

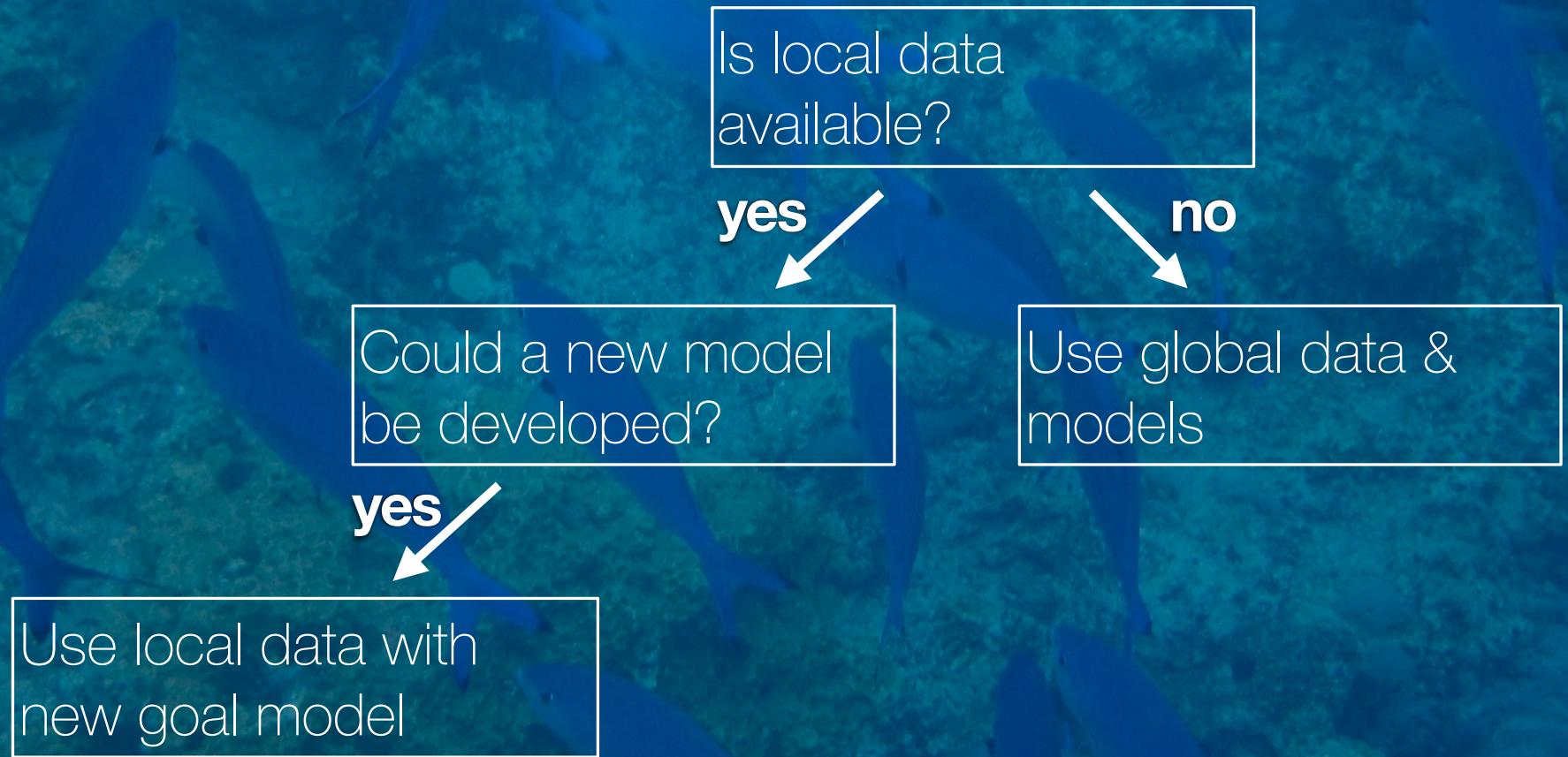
yes

Could a new model be developed?

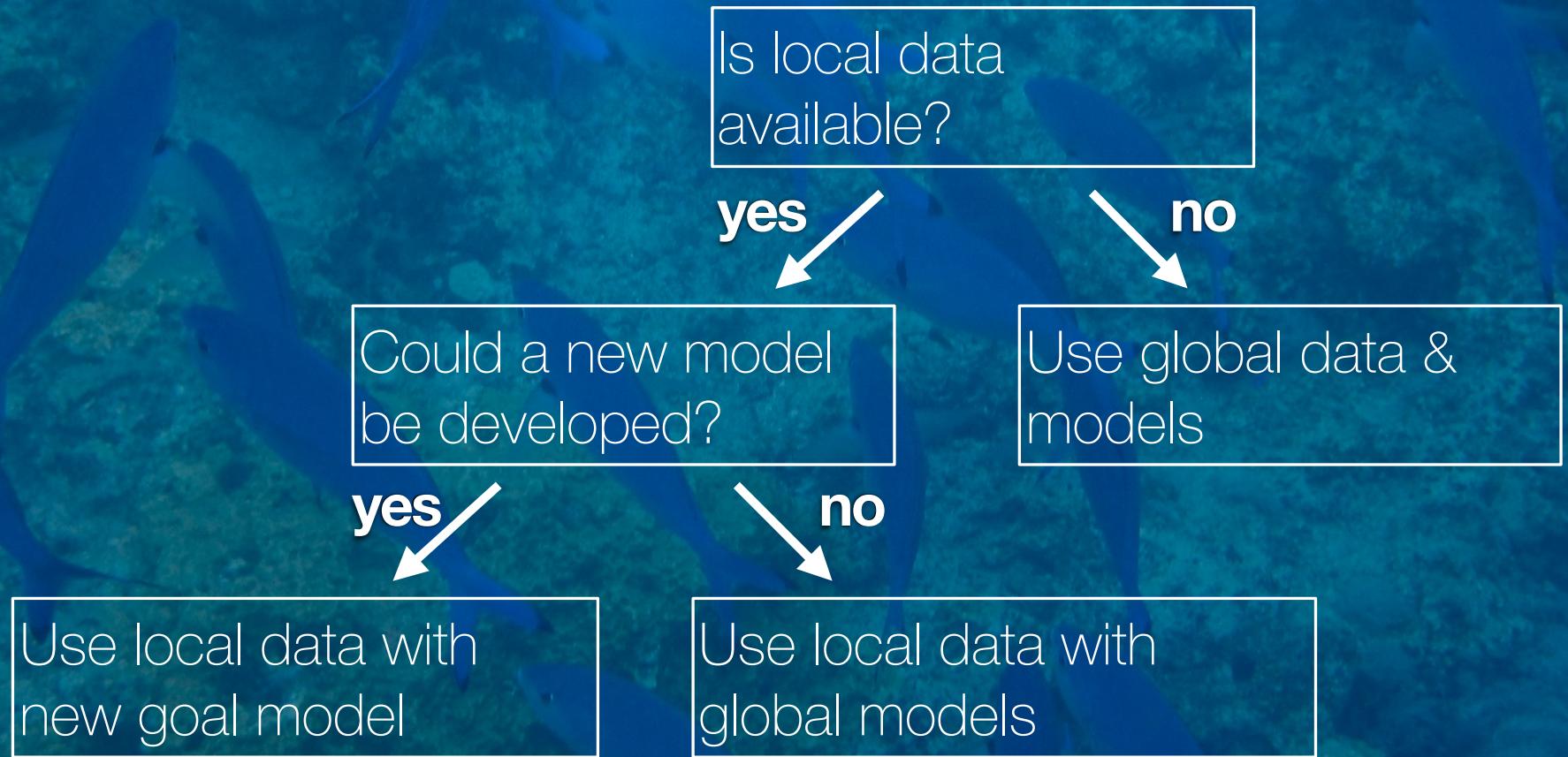
no

Use global data & models

# Data & Models Considerations



# Data & Models Considerations



# Data & Models Considerations

**Local data and improved goal models allow:**

# Data & Models Considerations

**Local data and improved goal models allow:**

A more accurate portrayal of the health of coastal oceans

# Data & Models Considerations

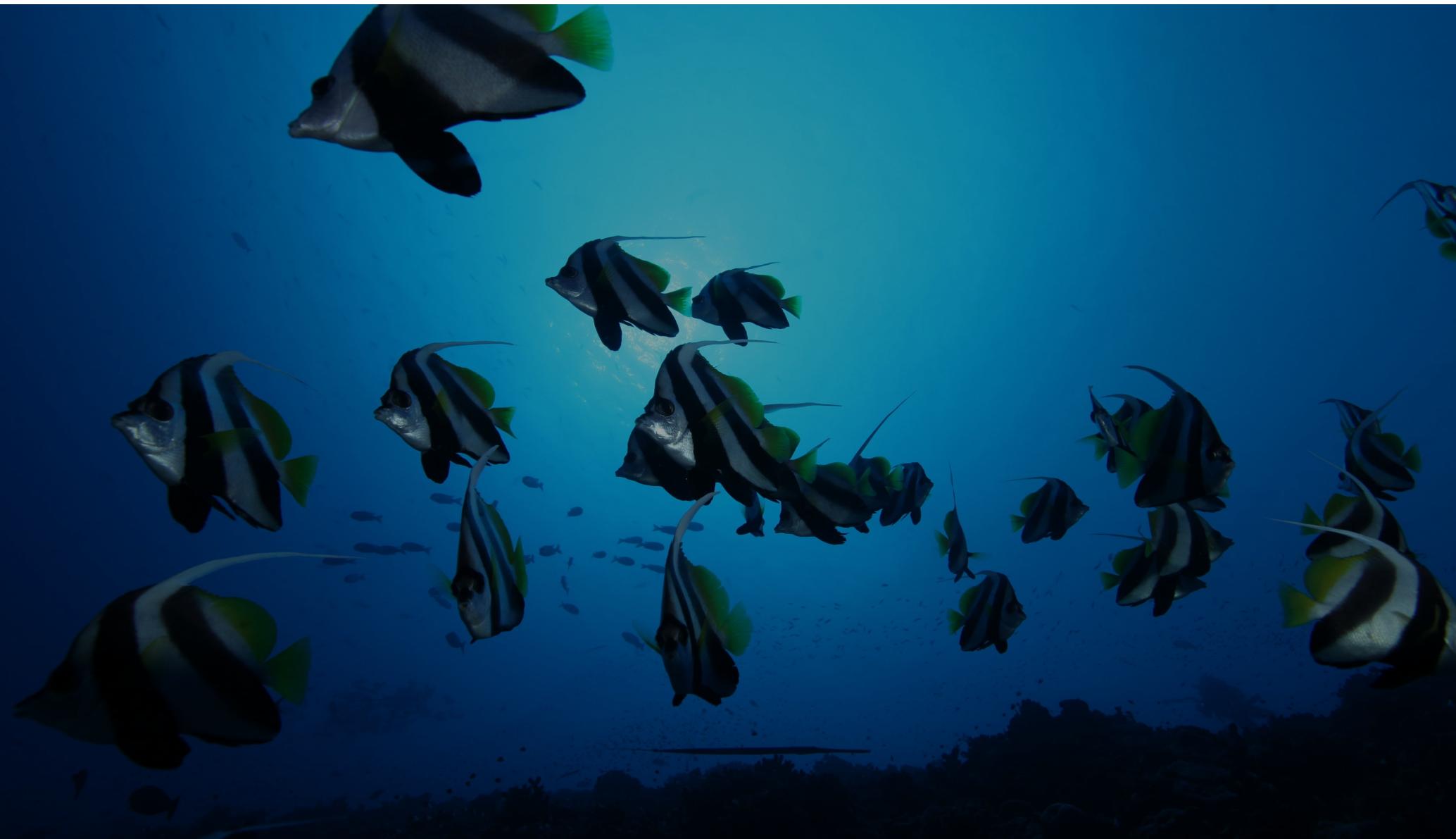
**Local data and improved goal models allow:**

Reference points with national and local perspectives —> track performance —> adaptive management

A composite image featuring two distinct scenes. The upper scene shows a man with a beard and mustache, shirtless, seated in a traditional wooden outrigger boat on a body of water. He is holding a long wooden pole. The lower scene is an underwater view of a coral reef, showing various types of coral in shades of green, brown, and yellow. The two scenes are stacked vertically.

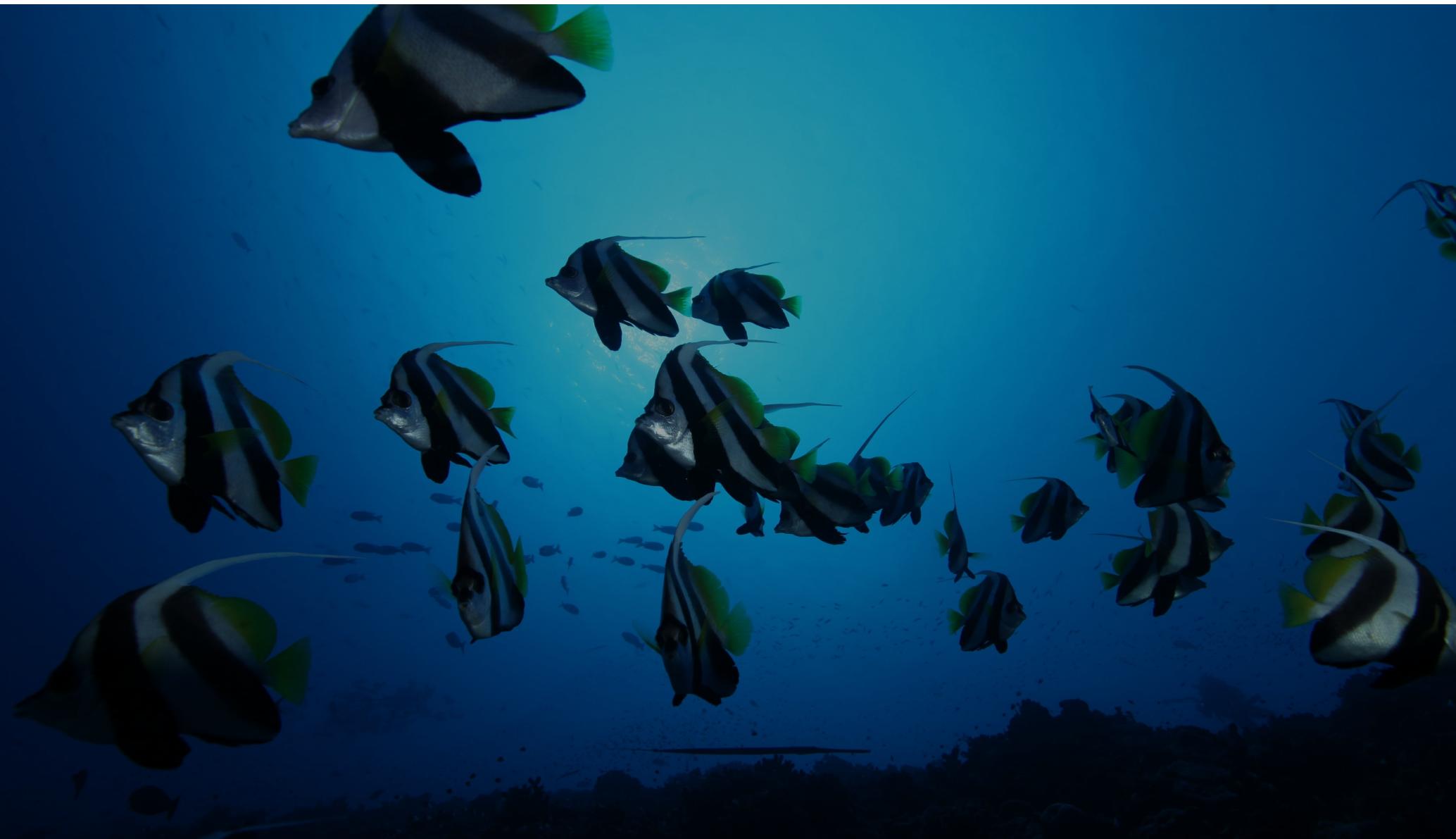
Thank You!  
Questions?

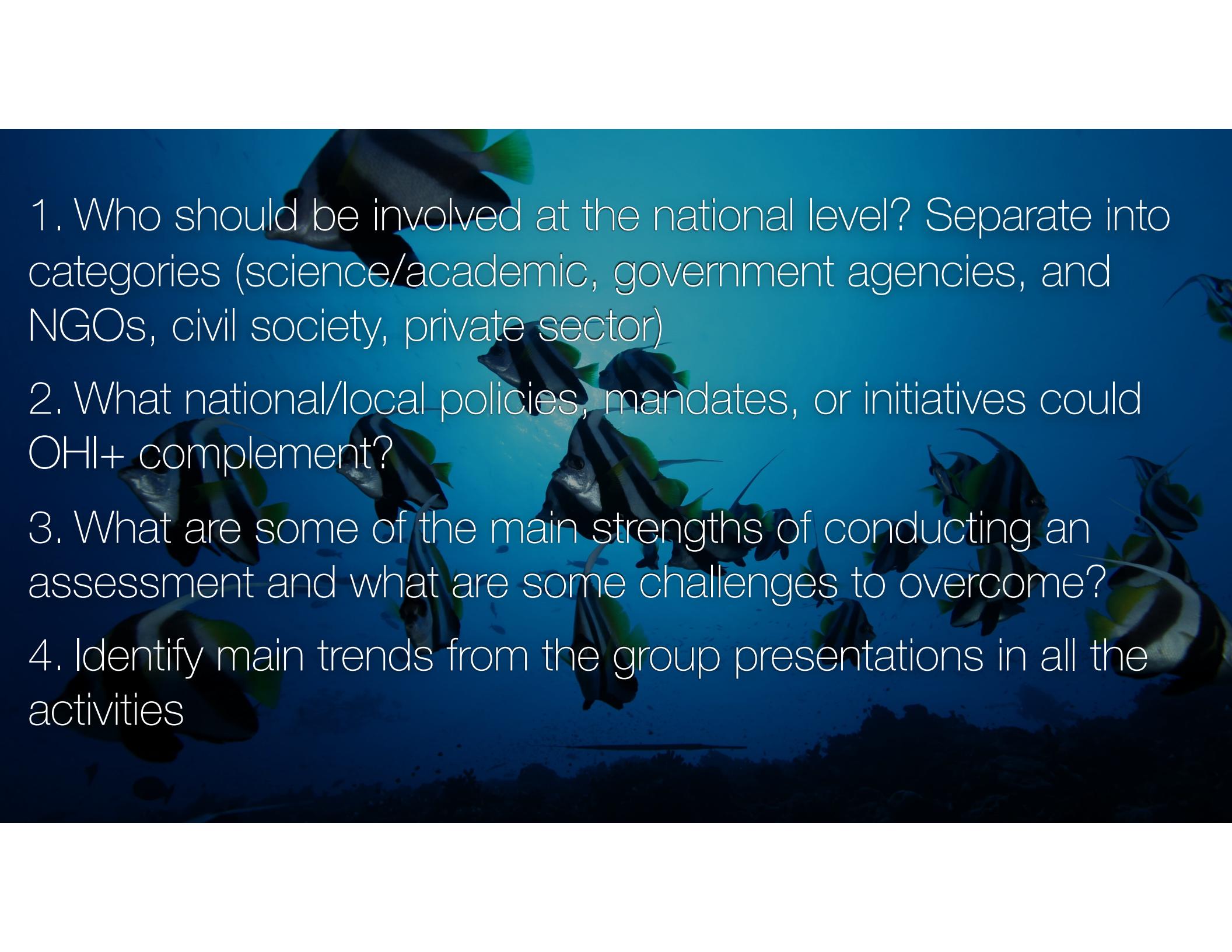
[www.ohi-science.org](http://www.ohi-science.org)



## GROUP ACTIVITY:

- Get back with your groups
- Discuss and answer the following questions (45 minutes)
- Each group presents back (30 minutes)
- Participants identify trends (15 minutes)



- 
- A vibrant underwater scene featuring a large school of tropical fish, likely surgeonfish or tangs, swimming in a synchronized, circular pattern. The water is a clear, translucent blue, allowing light to filter through and illuminate the fish. The fish have distinct black bodies with bright yellow or white fins and tails. They are positioned across the frame, creating a sense of depth and movement.
1. Who should be involved at the national level? Separate into categories (science/academic, government agencies, and NGOs, civil society, private sector)
  2. What national/local policies, mandates, or initiatives could OHI+ complement?
  3. What are some of the main strengths of conducting an assessment and what are some challenges to overcome?
  4. Identify main trends from the group presentations in all the activities