

11.13.02



EVOS
Trustee Council
Meeting

February 25, 2002

Exxon Valdez Oil Spill Trustee Council

441 W. 5th Ave., Suite 500 • Anchorage, Alaska 99501-2340 • 907/278-8012 • fax 907/276-7178



AGENDA EXXON VALDEZ OIL SPILL TRUSTEE COUNCIL MEETING

February 25, 2002 9:30 a.m.
441 West 5th Ave., Suite 500, ANCHORAGE

DRAFT

Trustee Council Members:

CRAIG TILLERY
Assistant Attorney General
State of Alaska

MICHELE BROWN
Commissioner
Alaska Department of
Environmental Conservation

DRUE PEARCE
Senior Advisor to the Secretary
for Alaskan Affairs
U.S. Department of the Interior

MARIA LISOWSKI for
DAVE GIBBONS
Forest Supervisor
Forest Service Alaska Region
U.S. Department of Agriculture

JAMES W. BALSIGER
Administrator, Alaska Region
National Marine Fisheries Service

FRANK RUE
Commissioner, Alaska
Department of Fish & Game

Teleconferenced in Anchorage, Restoration Office, 441 W 5th Ave, Suite 500
_____ State Chair

1. Call to Order - 9:30 a.m.
 - Approval of Agenda*
 - Approval of Meeting Notes*
 - December 11, 2001
2. PAG Report - Chuck Meacham
 - February 21, 2002 meeting -briefing
 - PAG charter amendments - briefing

Federal Trustees
U.S. Department of the Interior
U.S. Department of Agriculture
National Oceanic and Atmospheric Administration

State Trustees
Alaska Department of Fish and Game
Alaska Department of Environmental Conservation
Alaska Department of Law

3. Executive Director's Report
 - Injured species update - briefing
 - Upcoming TC meeting schedule
 - Research MOA
 - Oceans and Watershed Symposium
 - Quarterly project financial report
 - Quarterly project status report
4. Investments - 10:00 a.m.
 - Investment reports: December 2001 and January 2002
 - Callan's Capital Market Assumptions - Briefing by John Jenks
 - Discussion of Asset Allocation Policy*
5. Public Comment - 11:00 a.m.
6. Scientific and Technical Advisory Committee (STAC) process *
7. Work Plan Adjustments
 - Project 02630 - Designation of funding recipient (PICES)*
 - Project 02630 - Additional funds for water quality planning workshop*
 - Projects 01423, 00163, 00159: approval of bonus awards as allowable project costs*
8. Small Parcel Habitat Protection
 - Leisnoi, Inc. - Woody Island - briefing
 - Icicle Seafoods - KEN 309 *
 - Carlson/Hook Bay - KAP 285*

Adjourn - 1:30 p.m.

* Indicates tentative action items.

DRAFT

Exxon Valdez Oil Spill Trustee Council

441 W. 5th Ave., Suite 500 • Anchorage, Alaska 99501-2340 • 907/278-8012 • fax 907/276-7178



TRUSTEE COUNCIL MEETING NOTES

Anchorage, Alaska

December 11, 2001

By Molly McCammon
Executive Director

Trustee Council Members Present:

*Dave Gibbons, USFS
Drue Pearce, DOI
James Balsiger, NMFS

Frank Rue, ADF&G
● Michele Brown, ADEC
Craig Tillery, ADOL

* Chair

In Anchorage: Gibbons, Pearce, Balsiger, Rue, Kent, Brown and Tillery.

● Alternates:

Lynn Kent served as an alternate for Michele Brown from 10:11 a.m. until 11:45 a.m.

Meeting convened at 10:11 a.m., December 11, 2001, in Anchorage.

1. Approval of the Agenda

APPROVED MOTION: Approved the December 11, 2001 agenda (Attachment A).

Motion by Tillery, second by Balsiger.

2. Approval of Meeting Notes

APPROVED MOTION: Approved August 6, 2001 meeting notes (Attachment B)

Motion by Rue, second by Kent.

3. NOAA budget adjustment

APPROVED MOTION: Approved the reprogramming of remaining FY 01 funds from EVOS project funds not obligated to cover a spending overage in Project 1543.

Motion by Rue, second by Tillery.

Federal Trustees
U.S. Department of the Interior
U.S. Department of Agriculture
National Oceanic and Atmospheric Administration

State Trustees
Alaska Department of Fish and Game
Alaska Department of Environmental Conservation
Alaska Department of Law

4. Investment/Payout policy

Discussion. No action taken.

Public comment period began at 11:00 a.m.

Public comments received telephonically from 1 individual in Cordova and from 6 in Anchorage.

Public comment period closed at 11:29 a.m.

BREAK INTO EXECUTIVE SESSION

Off the record at (12:15 p.m.)

5. Executive Session:

APPROVED MOTION: Adjourn into executive session to discuss Executive Director evaluation and legal issues.

Motion by Tillery, second by Brown.

On the record at (1:25 p.m.)

6. FY 02 Work Plan - Deferred Projects

APPROVED MOTION: Adopted resolution 02-04 (Attachment C) to approve the FY 02 Work plan recommendations as outlined.

Motion by Tillery, second by Rue.

7. Kodiak three 10-acre parcels

APPROVED MOTION: Adopted resolution 02-01 (Attachment D) to provide funding for the United States Fish and Wildlife Service to offer, or purchase if an offer is accepted, all of each seller's rights and interest in the three 10-acre parcels (KAP 2071, KAP 2072, KAP 2073).

Motion by Rue, second by Brown.

8. Protection of land in Perenosa Bay

APPROVED MOTION: Adopted resolution 02-02 (Attachment E) supporting and encouraging the efforts underway by the Kodiak Brown Bear Trust, American Lands Conservancy, Rocky Mountain Elk Foundation and others to seek funds for protection of the coastal habitat in Perenosa Bay.

Motion by Rue, second by Brown.

BREAK

Off the record at (3:05 p.m.)

On the record at (3:20 p.m.)

9. Afognak Microwave station proposal

Discussion. No objection to the proposal. No formal action taken.

10. Jack Bay small parcel PWS 1010

APPROVED MOTION: Adopted resolution 02-03 (Attachment F) extending authorization for funding for small parcel PWS 1010 purchase to September 15, 2002. Amended by a contingency (Section I) that the U.S.F.S. provide a mineral study indicating low probability of mineral development.

Motion by Tillery, second by Rue.

11. Habitat grant priorities

Consultation with Conservancy and Conservation Fund. No action taken.

12. Proposed Scientific and Technical Advisory Committees

Discussion. Work group to be formed. Trustee Council to follow up with workgroup committee nominations. No formal action taken.

Meeting adjourned 5:08 p.m.

Motion by Rue, second by Tillery.

Meeting Summary

A. GROUP: Exxon Valdez Oil Spill Public Advisory Group (PAG)

B. DATE/TIME: December 10, 2001

C. LOCATION: Anchorage, Alaska

D. MEMBERS IN ATTENDANCE:

| <u>Name</u> | <u>Principal Interest</u> |
|----------------------|---------------------------|
| Torie Baker | Commercial Fishing |
| Chris Blackburn | Public-at-Large |
| Dave Cobb | Public-at-Large |
| Gary Fandrei | Public-at-Large |
| Brett Huber | Sport Hunting & Fishing |
| Dan Hull | Public-at-Large |
| James King | Conservation |
| Chuck Meacham, Chair | Science/Academic |
| Pat Norman | Native Landowner |
| Gerry Sanger | Commercial Tourism |
| Stan Senner | Environmental |
| Stacy Studebaker | Recreation Users |
| Chuck Totemoff | Forest Products |
| Ed Zeine | Local Government |

E. NOT REPRESENTED:

| <u>Name</u> | <u>Principal Interest</u> |
|----------------|---|
| Chris Beck | Public-at-Large |
| Vacant | Aquaculture |
| Martha Vlasoff | Subsistence |
| John Harris | Alaska State House of Representatives (<i>ex officio</i>) |
| Loren Leman | Alaska State Senate (<i>ex officio</i>) |

F. OTHER PARTICIPANTS:

| <u>Name</u> | <u>Organization</u> |
|-----------------|---|
| Dede Bohn | U.S. Geological Survey |
| John French | Pegasus Enterprises |
| Barat La Porte | Patton Boggs |
| Molly McCammon | Trustee Council Staff |
| Phil Mundy | Trustee Council Staff |
| Doug Mutter | Designated Federal Officer, Dept. of the Interior |
| Bud Rice | National Park Service |
| Sandra Schubert | Trustee Council Staff |
| Geoff Shester | Trustee Council Intern |

Bob Spies
Gary Thomas
Ken Taylor
Cherri Womac

Trustee Council Chief Scientist
Prince William Sound Science Center
Office of the Governor
Trustee Council Staff

G. SUMMARY:

The meeting was convened December 10 at 10:05 a.m. by Chuck Meacham. Roll call was taken, a quorum was present. The agenda was reviewed and modified. The July 18, 2001 meeting summary was approved.

Molly McCammon gave the Executive Director's report. She outlined the December 11 Trustee Council meeting agenda. A tour of the Alaska Resources Library & Information Services (ARLIS) will take place in the morning before the meeting. PAG members are welcome to attend the tour and the meeting. She discussed the new office location and invited all to attend the open house after the Tuesday meeting. She said they were interviewing for a Data Manager. She introduced intern Geoff Shester. The North Pacific Research Board (NPRB) Executive Director (who is in the process of being hired) will have offices co-located with the Trustee Council.

McCammon discussed the Trustee Council investments. Bob Storer, Permanent Fund Executive Director, serves as one of the Trustee Council advisors. The payout for the fund set by the Trustee Council is \$6.5 million for FY 2002. This amount will decrease to \$6.0 million each for the following two years. The habitat program is supported by a separate fund. The funds will be inflation-proofed.

She noted that the lower Cook Inlet waste management project lead at the Alaska Department of Environmental Conservation, Marianne See, had left and the project was being revisited.

The Koniag easement on Kodiak Island is the only large habitat protection project outstanding. Pending small projects include: several small parcels on Kodiak, including Termination Point; parcels on Northern Afognak Island proposed by the Rocky Mountain Elk Foundation and others; and Jack Bay, near Valdez. The agreement with The Nature Conservancy and The Conservation Fund for small parcel protection support is still a pilot project. The Trustee Council will be asked to consider accommodating an Alascom microwave tower on an EVOS-acquired parcel on Afognak Island.

Jim King asked about the status of the Valdez Duck Flats. McCammon said that one parcel had title problems and was not acquired. Two other parcels are in process, with offers good until September 2002.

Stacy Studebaker asked about the Termination Point and associated acquisitions. McCammon said there were title problems with some of the parcels. The Kodiak Island Borough and Lesnoi Inc. have proposed a road and small boat harbor development on the Termination Point site. Stacy relayed her concerns about this.

Pat Norman asked if an archeological survey had been completed for Jack Bay. McCammon

replied that she did not know, but would check.

McCammon said that the National Research Council (NRC) review of the Gulf Ecosystem Monitoring and Research Program (GEM) was behind schedule due to late preparation of the draft program document (mailed to PAG members). The NRC report is expected in April 2002. She reminded the group that the current Trustee Council will continue through 2006, the time frame under the agreement for re-opening claims from injuries due to the spill. She noted that interest in marine science and environment in Alaska has increased in recent years and that several new programs are underway.

The annual EVOS restoration workshop is scheduled for January 22-25, 2002 in Anchorage at the Egan Center. A series of four workshops are scheduled. PAG members are welcome to attend—contact the EVOS office to register and make arrangements. Another workshop, the Statewide Alaska Oceans and Watershed Symposium is scheduled for June 18-19, 2002. This cooperative conference is supported by EVOS, the North Pacific Research Board (NPRB), the State of Alaska, the University of Alaska and a number of federal agencies: NOAA, DOI and EPA.

The session was opened for public comment. John French reported on the status of a proposed FY 2002 project (Project 02674) restoring pigeon guillemots in the Seward area. Due to a loss of key personnel, the Trustee Council will consider rescinding funding for the project. He requested that the funding not be rescinded.

Gary Thomas gave a presentation about recent research findings concerning herring population estimation and herring and marine mammal predation in Prince William Sound. Use of new technologies, increased field observations, additional data collection platforms, and new computer modeling systems offer improved descriptive and predictive capabilities that could help better manage resources.

Bob Spies gave an overview of the projects for FY 2002 that were previously deferred. These projects are to be considered by the Trustee Council tomorrow. McCammon said there is a \$5 million cap on the FY 2002 work plan. Some \$3.1 million in projects have already been approved, and 16 of the 25 deferred projects are now recommended for funding, adding \$1.4 million to the work plan. Spies went through the projects on Spreadsheet A by categories:

- oil injury
- spill recovery monitoring
- ecosystem recovery & function
- spill general restoration
- GEM transition: strategies to improve monitoring
- GEM transition: tools to improve monitoring
- GEM transition: synthesis & retrospective analysis
- GEM transition: long-term monitoring
- habitat protection & improvements
- data management & information transfer
- community involvement/public outreach/other

He said that project 02585 resulted in estimates of about 20 acres of remaining subsurface oil in Prince William Sound, mostly in the lower subtidal zone. Norman wondered why Kenai Peninsula areas were left out of habitat mapping in project 02556. Baker asked if data would be lost if 02674 was not done this year.

Brett Huber asked if the lateness of getting reports from projects was a problem. McCammon said that it was, about 40 of 150 reports are overdue. King said he liked the trend toward more mapping of resource information, and wondered if an atlas of resource data could be done for Prince William Sound. McCammon said that the ESI map atlas was such a reference. Chris Blackburn offered that the old Outer Continental Shelf Environmental Program generated a lot of data, and wondered if it had been of use. McCammon said this information was used in preparing the GEM Program Document. Meacham asked why some projects that seemed worthy were still not recommended. McCammon said those projects were lower priority and they wanted to stay under the cap in case a new need arose during this year of transition. Dan Hull suggested a possible cooperative project would be seabird avoidance measures for long-liner and other fishing vessels.

Studebaker asked why project 02680 was not funded. McCammon said the NOAA team proposed to do the project was committed to another project and that several other efforts to look at contaminants were underway by other organizations. Other agency efforts on contaminants need to be considered before deciding how EVOS fits in. Norman asked about project 02052. McCammon said that changing role and interests at the local level made this effort uncertain at this time; it will be re-examined in the next month and a revised proposal presented to the Trustee Council in February.

Huber recommended that the PAG pass along to the Trustee Council its concerns about late reports from projects—such reports are important components of research and help determine future efforts. McCammon said the list of late reports was in the quarterly report, and that she agreed that it was important to obtain all reports, to streamline the system, and ensure accountability.

Meacham said there appeared to be general support for the staff recommendations on the deferred FY 2002 work plan projects.

McCammon gave a status report on the GEM program. She said the draft program was on the EVOS web site. The NRC report is due in April and the plan is to make necessary revisions to the program and have the Trustee Council approve it at their June 2002 meeting. Then the program would be implemented in FY 2003. Since the program is 4-5 months behind schedule, next year's work plan will be done in two phases: 1) an invitation will go out February 15 and proposals will be due April 15 for about 2/3 of the projects that are primarily ongoing activities; 2) the remaining projects, to be in-line with GEM, will be part of an invitation in September with proposals due in January 2003.

The proposed organization for science and technical advice and public advice was reviewed by McCammon. The Trustee Council (with staff) will continue, as is, for at least the next 5 years. A new Scientific and Technical Advisory Committee (STAC), and set of subcommittees, is proposed to work with the staff on scientific and project-related issues,

replacing the core peer review committee. There would be seven members representing various disciplines. The STAC should be in place by May 2002 for a transition from the current project review process. It is proposed that the PAG become the Program Advisory Committee (PAC), with 20 members, including 4 from the STAC.

Senner suggested that there were too many subcommittees, making administration of the program difficult and costly. The proposed structure should be costed. Mundy said that the subcommittees were envisioned as "email" type groups and that meetings could be "piggy-backed" onto other meetings. Senner also recommended that a Principal Investigator should be able to sit on a subcommittee, but not chair it. He also said that Trustee Council staff should not serve as a "voting member" of the STAC. Hull asked about possibly establishing a subcommittee on human use activities.

Mutter presented information about Federal Advisory Committee Act (FACA) requirements imposed on the proposed PAC. Some FACA requirements include: charter renewal every 2 years, a lead Federal agency, balanced membership, open meetings with public comment, notices of meetings published in the *Federal Register*, meeting minutes for the public record, and annual reports to the General Services Administration. The charter for the group should be ready to be signed by the Secretary of the Interior by the start of the next fiscal year (September 30, 2002). He said it takes about 100 days to get a charter through the process and about 100 days for the member appointment process. The member appointment effort could begin as soon as the Trustee Council approved the charter.

Hull said he likes the PAC approach. Huber said it was important to maintain connections with people and not disenfranchise a group. Dave Cobb said that the stakeholders were essentially the same as now on the PAG. There was discussion about the positive value of having various interest groups get together.

Cobb moved (second by Hull) to prepare a draft new charter, considering equal representation of existing PAG areas of interest, for PAG discussion in February. Passed unanimously.

Shester gave an overview of the report he compiled, "Report on Information Needs and Collaboration Opportunities between GEM and Alaska Marine Conservation Organizations." Hull and Baker suggested a similar effort be done regarding collaboration with fishing organizations. Huber suggested broadening the scope to include watersheds. Shester also briefly discussed another report, "Recommendations for Citizen Volunteer Monitoring Models."

Hull noted that EVOS project results were used as input in determining some policy decisions at the recent North Pacific Fisheries Management Board meeting.

The meeting adjourned at 4:25 p.m.

H. FOLLOW-UP:

1. McCammon, Schubert, and Mutter will prepare a draft PAC Charter for review at a

February PAG teleconference. The goal is to have a new draft charter ready for Trustee Council approval at their June meeting, and then begin the PAC member nomination process.

I. NEXT MEETINGS:

- Tentatively a teleconference mid to late February
- A meeting June 17 or 20 in Anchorage
- A field trip to Prince William Sound in mid-August
- The Annual EVOS Workshop is scheduled for January 22-25, in Anchorage

J. ATTACHMENTS: (Handouts, for those not present)

1. EVOS Annual Workshop Registration Form
2. Spreadsheet A: Executive Director's Recommendation on Deferred Projects/FY02 Work Plan
3. Memo from John French about project 02674 Assessing Pigeon Guillemot Restoration Technologies
4. Letter from Cordova District Fishermen United in support of the Adams/Ross proposal (Project 02636)
5. Alaska's Cooperatively Implemented Information Management System fact sheet (Project 01396)

K. CERTIFICATION:

PAG Chairperson

Date

PROPOSED REVISIONS TO PAG CHARTER

2/22/02

1. Change name from Public Advisory Group (PAG) to Program Advisory Committee (PAC)
2. Expand scope of PAC's advice to include "planning, evaluation, and conduct of long-term monitoring and research activities"
3. Extend existence of PAC from 9/30/02 to "at least 9/30/06"
4. Increase membership from 17 to 20
5. Change membership from specific assigned seats to appointments that "represent a balanced representation of" certain interests, as follows:

| Current PAG (assigned seats) | Proposed PAC (interests to be represented) |
|--|---|
| Aquaculture | Expand to include mariculture |
| Commercial fishing | Same |
| Commercial tourism | Combine commercial tourism & recreation |
| Recreation users | |
| Conservation | Combine conservation & environmental |
| Environmental | |
| Forest products | Delete |
| Local government | Delete |
| Native landowner | Replace with tribal government |
| Subsistence | Same |
| Science/academic | Replace with science/technical, and specify that the STAC (Science & Technical Advisory Committee) will nominate 1-3 of its members to serve on PAC |
| Sport hunting & fishing | Same |
| 5 public-at-large | Same, but don't specify number |
| -- | Regional monitoring program |
| -- | Marine transportation |
| Ex officio (not specified in charter): 2 legislators | Replace with 2 resource agency managers |

6. Change number of meetings per year from "no less than four" to "no less than two"

PROPOSED REVISIONS TO PAG CHARTER

2/19/02

1. Change name from Public Advisory Group (PAG) to Program Advisory Committee (PAC)
2. Expand scope of PAC's advice to include "planning, evaluation, and conduct of long-term monitoring and research activities"
3. Extend existence of PAC from 9/30/02 to "at least 9/30/06"
4. Increase membership from 17 to 20
5. Change membership from specific assigned seats to appointments that "represent a balanced representation of" certain interests, as follows:

| Current PAG (assigned seats) | Proposed PAC (interests to be represented) |
|------------------------------|---|
| Aquaculture | Expand to include mariculture |
| Commercial fishing | Same |
| Commercial tourism | Same |
| Conservation | Same |
| Environmental | Same |
| Forest products | Delete |
| Local government | Same |
| Native landowner | Expand to include Native government |
| Recreation users | Same |
| Science/academic | Replace with science/technical, and specify that the STAC (Science & Technical Advisory Committee) will nominate 1-3 of its members to serve on PAC |
| Sport hunting & fishing | Same |
| Subsistence | Same |
| 5 public-at-large | Delete |
| -- | Marine transportation |

6. Change number of meetings per year from "no less than four" to "no less than two"

CHARTER
EXXON VALDEZ OIL SPILL PROGRAM ADVISORY COMMITTEE

1. Official Designation: Exxon Valdez Oil Spill Program Advisory Committee.
2. Objectives and Scope: In accordance with and pursuant to Paragraph V.A.4 of the Memorandum of Agreement and Consent Decree entered into by the United States of America, through the Department of Justice, and the State of Alaska, through the Attorney General, on August 27, 1991 and approved by the United States District Court for the District of Alaska in settlement of United States of America v. State of Alaska, Civil Action No. A91-081 CV, hereinafter referred to as the MOA, the Program Advisory Committee shall advise the Trustees (State of Alaska Department of Law, State of Alaska Department of Fish and Game, State of Alaska Department of Environmental Conservation, U.S. Department of Agriculture, the National Oceanic and Atmospheric Administration of the U.S. Department of Commerce, and the U.S. Department of the Interior) through the Trustee Council with respect to the following matters:

All decisions relating to injury assessment, restoration activities, or other use of natural resource damage recoveries obtained by the Governments, including all decisions regarding:

- a. Planning, evaluation, and allocation of available funds;
 - b. Planning, evaluation, and conduct of injury assessments and restoration activities;
 - c. Planning, evaluation, and conduct of long-term monitoring and research activities;
 - d. Coordination of a, b, and c.
3. Period of Time Necessary for the Committee Activities: By order of the District Court for the District of Alaska, the Program Advisory Committee is to advise the Trustees, appointed to administer the fund established in settlement of United States v. Exxon Corporation, Civil Action No. A91-082, and State of Alaska v. Exxon Corporation, Civil Action No. A91-083, both in the United States District Court for the District of Alaska, in all matters described in Paragraph V.A.1 of the MOA referenced above. Final payment into the fund was September 1, 2001. A four-year period allowing the opportunity for the Trustees to reopen the agreement to possibly receive additional compensation for injuries begins October 2002 and ends September 30, 2006. It is expected that the need for the Program Advisory Committee will continue until at least September 30, 2006. Extension

of the Committee beyond such date is subject to the unanimous written consent of the designated trustees.

4. Official to Whom the Program Advisory Committee Reports: The Program Advisory Committee shall report to the Exxon Valdez Settlement Trustee Council through the Chair of the Program Advisory Committee at Trustee Council meetings. Other members of the Committee may report with the Chair, as appropriate. The Trustee Council's regular agenda shall include a period during which the Program Advisory Committee representative(s) may report on its activities, ask questions of the Trustee Council, and be available for questioning by the Trustee Council. The U.S. Department of the Interior is the designated Federal agency to which the Program Advisory Committee reports to ensure compliance with the Federal Advisory Committee Act, including the responsibility of ensuring the necessary support for the Program Advisory Committee. The Designated Federal Officer is the Alaska Office of Environmental Policy and Compliance's Regional Environmental Assistant, or his designee.
5. Administrative Support: Administrative support for the Program Advisory Committee shall be provided by the Trustee Council's Executive Director. The Executive Director shall prepare an annual budget for the Program Advisory Committee. The budget shall provide the Program Advisory Committee such funds as the Trustee Council deems appropriate for administrative support for the Program Advisory Committee, from the Exxon Valdez Oil Spill Investment Fund established as a result of the settlement of United States v. Exxon Corporation and State of Alaska v. Exxon Corporation.
6. Program Advisory Committee Membership, Selection, and Service: The Program Advisory Committee shall consist of 20 members, including a Chair and Vice-Chair.

- a. Qualifications for Service - Members shall be appointed to represent a balanced representation of the following interests: aquaculture and mariculture; commercial fishing; commercial tourism; conservation; environmental; local government; Native landowner and government; recreation users; science/technical; sport hunting and fishing; subsistence; and marine transportation.

Representatives shall be chosen based on their demonstrated knowledge of the region, peoples, or principal economic and social activities of the area affected by the *Exxon Valdez* oil spill, roughly the northern Gulf of Alaska, or by demonstrated expertise in public lands and resource management or research as it relates to restoration, as applicable.

- b. Nomination and Selection - Nominations for membership may be submitted by any source. The Science and Technical Advisory Committee shall nominate at least one but not more than three members to represent science/technical

- interests. From these nominations the Trustee Council will recommend membership to the Trustees, and following selection by the Trustees, the Secretary of the Interior appoints those selected by the Trustees.
- c. Minimum Term - Each member may serve two years from the date of appointment. Members are eligible for renomination and reappointment at the close of their terms. The Trustees may remove a member or officer of the Program Advisory Committee for reasons of malfeasance, incompetence, or failure to attend to membership responsibilities.
 - d. Officers - The Program Advisory Committee shall have a Chair and a Vice-Chair elected by the membership.
7. Expenses: Travel, per diem and administrative support shall be borne by the Trustee Council using funds from the *Exxon Valdez* Oil Spill Investment Fund established in settlement of United States v. Exxon Corporation and State of Alaska v. Exxon Corporation. While away from home or regular place of business in performance of business of the Program Advisory Committee, members shall receive travel expenses, including per diem in lieu of subsistence, at the applicable government rate.
8. Program Advisory Committee Meetings and Records: The Program Advisory Committee shall meet no less than two times per year.
- a. All Program Advisory Committee meetings will be open to the public. Any member of the public is permitted to file a written statement with the Program Advisory Committee and any member of the public may speak at a Program Advisory Committee meeting.
 - b. Detailed minutes of all meetings, including the time, date and place of the meeting, names of the Program Advisory Committee members and other staff of the Trustee Council present, names of the public who presented oral or written statements, an estimate of the number of other public present, an accurate description of each matter discussed and each matter resolved, if any, by the Program Advisory Committee, shall be prepared and made available to the public through the Executive Director. The Chair shall certify to the accuracy of all minutes of the Program Advisory Committee.
 - c. Meetings of the Program Advisory Committee shall be held at a reasonable time and in a place reasonably accessible to the public. Notice of meetings shall be published in accordance with AS 44.62.310(e), AS 44.62.175 and 41 CFR 101-6.1015(b).

- d. All accounts and records of the activities and transactions of the Program Advisory Committee shall be kept and maintained by the Staff of the Executive Director and, subject to the provisions of 5 U.S.C. section 552, such accounts and records shall be available for public inspection at the offices of the Executive Director.
 - e. All rules and procedures governing the proceedings of the Program Advisory Committee must be approved by the Trustee Council.
9. Administrative Authority: The Program Advisory Committee functions are advisory only, and its officers shall have no administrative authority by virtue of their membership. The Trustee Council, through the Executive Director, shall procure all needed space, supplies, equipment, and support for the Program Advisory Committee.
10. Termination Date: The Federal Advisory Committee Act, 5 U.S.C. App., requires that the Program Advisory Committee shall terminate four years from the date of filing of this Charter unless the Committee is renewed before that date in accordance with the requirements of that Act.
11. Authority: This Program Advisory Committee is established as mandated by Paragraph V.A.4 of the MOA and shall be located in Alaska. Additional authority for its creation is found in the Comprehensive Environmental Response, Compensation, and Liability Act of 1980, as amended, 42 U.S.C. subsection 9601 et seq.

Secretary of the Interior

Date Signed: _____

Date Filed: _____

CERTIFICATION

I hereby certify that the renewal of the Charter of the Program Advisory Committee, an advisory committee to make recommendations to and advise the *Exxon Valdez* Oil Spill Trustee Council in Alaska, is necessary and in the public interest in connection with the performance of duties mandated by the settlement of United States v. State of Alaska, No. A91-081 CV, and is in accordance with the Comprehensive Environmental Response, Compensation and Liability Act of 1980, as amended and supplemented.

Date

Gale Norton

Secretary of the Interior

2002 TC MEETING SCHEDULE (TENTATIVE)

| <u>Date</u> | <u>Agenda Items</u> | <u>Action Item?</u> |
|----------------|---|--|
| Feb. 25 | STAC process PAG charter, membership, etc. Injured Species List Update Appoint operating procedures work group | Action Briefing Briefing Action |
| about April 1 | STAC appointments Injured Species List Update PAG charter, membership, etc. | Action Action Action |
| about June 4 | GEM: NRC report, proposed revisions Revised operating & report procedures (including liaison & project mgt. recommendation) | Briefing Briefing |
| about July 8 | GEM Program Document Revised operating & report procedures (including liaison & project mgt. recommendation) New data policy | Action Action Briefing |
| about August 2 | Approve Phase I projects New data policy Habitat grant (expires 9/30/02) | Action Action Possible action |
| November | Approve Phase II projects | Action |

12-4-01 DRAFT
Memorandum of Agreement
among the *Exxon Valdez* Oil Spill Trustee Council
and the North Pacific Research Board
and the Northern Fund of the Pacific Salmon Commission
and the University of Alaska

Section I. Parties

This Memorandum of Agreement ("MOA") is entered into by and among the *Exxon Valdez* Oil Spill Trustee Council, the North Pacific Research Board, the Northern Fund of the Pacific Salmon Commission, and the University of Alaska (these entities are collectively referred to as the "Parties").

Section II. Purpose

The State of Alaska and the United States are committed to maintain, monitor, and protect the health of Alaska's oceans and watersheds and their resources. This can be best accomplished through collaborative, coordinated efforts among the State of Alaska and the United States acting through the Parties to this MOA. The Parties have shared, overlapping, or common authority for scientific research, monitoring, and management of the fish and wildlife resources of the North Pacific Ocean and its watersheds. The purpose of this MOA is to facilitate the collaboration and coordination necessary for the State of Alaska and the United States to more effectively monitor and manage Alaska's oceans and watersheds and the fish and wildlife resources for which they provide habitat so as to assure the long term health and sustainability of the habitats and resources. This MOA will provide a framework for the Parties to work cooperatively so as to more effectively accomplish their individual and common missions.

Section III. Findings

The Parties to this MOA make the following findings:

- 1) The North Pacific is extensive and contains fish and wildlife resources of great economic, social, cultural, and scientific value;
- 2) Populations of many commercial and non-commercial species in Alaska's oceans and watersheds are rapidly declining or increasing for reasons not well understood;
- 3) Improved scientific understanding of the North Pacific will improve management of the region, thereby increasing the sustainability and efficiency of human use;
- 4) Scientific understanding of the North Pacific can best be achieved through cooperation and collaboration of separate entities involved in marine research in a mutually beneficial manner;
- 5) While each Party to this MOA has its own mission and operates independently, together they share common interests in Alaska's oceans and watersheds;

- 6) Alaska's oceans and watersheds can be best managed and understood through an ecosystem-based approach, which is directed toward understanding how habitats and communities of species function together in response to environmental and anthropogenic factors, and which includes traditional single species or - commodity production; and
- 7) A comprehensive plan for marine research in the North Pacific is necessary to coordinate the efforts of Parties in order to maximize the benefits to the people who use and depend on Alaska's marine resources.

Section IV. Research and monitoring plan.

The Parties to this MOA shall jointly develop a comprehensive research and monitoring plan for the North Pacific. The comprehensive research and monitoring plan will establish shared research priorities and guide the Parties in working jointly towards attaining these priorities. The comprehensive research and monitoring plan will also provide for the Parties to: a) coordinate, to the extent permitted by governing legal mandates, the timelines and processes for proposal solicitation, review, and decision-making, and b) cooperate in developing a network of people to assist with proposal and program reviews upon request.

Section V. Information and data.

In order to make information produced by the Parties available to each other and the public, the Parties to this MOA shall:

- a) Share information regarding: 1) public meetings and newsletters, 2) timelines and processes for proposal solicitation, review, and decision-making, 3) ongoing and proposed research and monitoring activities, 4) invitations for proposals, and 5) results and data from all scientific research;
- b) Cooperate in formulating procedures and mechanisms through which such information can be effectively shared; and
- c) Develop specific data standards and standardization and quality control procedures so data is of the highest quality and compatible between participating agencies.

Section VI. Shared resources. In order to reduce costs, increase efficiency, and avoid duplication of effort, the Parties shall expedite access to each other's facilities and equipment and to pool inventories of costly technology development projects and scarce human skill sets through the following actions:

- a) Create a system through which each Party may use the facilities of the other Parties for purposes relating to shared research and monitoring goals;
- b) Develop a list of technologies for which the Parties will share development costs;
- c) Develop a list of facilities and equipment for research and monitoring purposes potentially available for sharing;
- d) Develop a directory of agency employees with scarce human skill sets who may be available to advise the Parties to this agreement; and

- e) Plan a timeline and process for use of these resources so they will be effectively shared and the interests of owners and employers will be protected.

Section VII. Periodic formal meetings. The parties to this MOA will meet formally and not less often than annually. The objectives of these meetings are to foster cooperation among the parties, share findings with other participatory agencies, evaluate the comprehensive research plan and progress towards its implementation, and make revisions to the plan as needed. In order to facilitate the meetings the Parties shall:

- a) Identify a representative individual for the Party and an alternate;
- b) Physically attend all meetings through a designated representative or alternate;
- c) Determine the frequency that the meetings will be held;
- d) Determine the location and exact dates of each meeting; and
- e) Provide financial support for the meeting.

Section VIII. Leadership. To ensure effective facilitation of formal meetings and adequate follow-through, each of the Parties will function as the administrative lead on a rotating basis for one-year intervals. As the administrative lead, a Party is responsible for organizing and funding the annual meeting, developing an agenda for the meeting, and corresponding with other Parties throughout the year to ensure adequate implementation of this MOA. Each Party to this MOA shall:

- a) Provide the funding, staff, and organizational infrastructure necessary to fulfill its responsibilities of administrative lead;
- b) Designate lead agencies for specific tasks or components of the comprehensive research and monitoring plan; and
- c) Function as a lead agency in a specific area of expertise if designated by other Parties to do so.

Section IX. Participation of other entities and facilities. The Parties recognize that adding new participatory agencies involved in North Pacific marine issues to this MOA will better enable participatory agencies to reach shared goals. The Parties to this MOA shall:

- a) Recognize and promote the participation of other organizations that may contribute to the shared interests of monitoring and researching the North Pacific marine environment; and
- b) Establish a mechanism through which new participants can be integrated into the comprehensive research plan.

Section X. General provisions.

- 1) Effective date. This MOA becomes effective upon the date of the signature of the last Party to execute it. This MOA may be executed in counterparts, each of which will be considered an original document.
- 2) Withdrawal. Any party to this MOA may withdraw upon thirty days written notice to the other Parties.

- 3) Termination. This MOA shall remain in effect until it is terminated by agreement of the Parties.
- 4) Authority. Nothing in this MOA shall be construed to limit or modify the authority or responsibility of any participating agency.
- 5) Third parties. This MOA is not intended to, nor shall it, vest rights in persons or entities who are not Parties.
- 6) Amendment. This MOA may be amended in writing by the unanimous written agreement of the Parties.
- 7) Antideficiency. Nothing in this MOA shall be construed as obligating the United States or the State of Alaska, their agents or employees, to expend funds in excess of that authorized by law.
- 8) Notice. Any notice, request, order, or communication to the Parties pursuant to this MOA shall be in writing to each Party at the address that follows:

or to such other addresses as any Party may designate in writing.

Signatures:

(This list will be an amendable document to allow for other agency participation)

- Exxon Valdez Oil Spill Trustee Council
 - Alaska Department of Fish and Game
 - Alaska Department of Environmental Conservation
 - Alaska Department of Law
 - U.S. Department of the Interior
 - U.S. Department of Agriculture
 - National Oceanic and Atmospheric Administration
- Northern Pacific Research Board
 - Alaska Department of Fish and Game
 - National marine Fisheries Service
 - North pacific Fisheries Management Council
 - Alaska SeaLife Center
 - Commercial Fishing Representative
- Northern Fund of the Pacific Salmon Commission
 - National Marine Fisheries Service
 - Alaska Department of Fish and Game
 - Canadian Department of Fisheries and Oceans
- University of Alaska

School of Fisheries and Ocean Sciences
Alaska Regional Supercomputer Center

February 15, 2002 draft

**ALASKA'S OCEANS AND WATERSHEDS:
Sustainability in the context of change**

June 18-19, 2002

Captain Cook Hotel

Anchorage, AK

(confirmed; 210 for lunch, @450 for symposium)

A 2 day symposium sponsored by: State of Alaska, University of Alaska, *Exxon Valdez* Oil Spill Trustee Council, North Pacific Research Board, North Pacific Fisheries Management Council, Alaska Board of Fisheries, Alaska Coastal Policy Council, NOAA, DOI: USGS/USFWS, EPA.

Steering committee: Molly McCammon, EVOS Trustee Council; Vera Alexander, School of Fisheries and Ocean Sciences, University of Alaska Fairbanks; Clarence Pautzke, North Pacific Research Board; John Sisk and Lisa Weissler, Office of the Governor, State of Alaska; John White, Alaska Board of Fisheries; Rosa Meehan, U.S. Dept of the Interior; Anne Hollowed and Bill Hines, National Marine Fisheries Service; Greg Kellogg and Jackie Poston, EPA; Robbie Faggerstrom, Alaska Coastal Policy Council; Rob Bosworth, Alaska Department of Fish and Game; and Pete Peterson, coastal ecology consultant.

Purpose: A statewide symposium for government leaders, resource managers and policy-makers, scientists, stakeholders and members of the public, focusing on Alaska's oceans and watersheds. The symposium will provide a unique opportunity to obtain an overall picture of the status and trends of Alaska's marine resources and ecosystems and to discuss ecosystem-based management and changes in oceans and watersheds policy and governance. It will also provide a forum for signing of a Memorandum of Agreement among the major marine research entities in the state to institutionalize cooperation and collaboration among them.

DAY ONE

| | |
|-----------------|--|
| 8:00 – 8:30 am | Registration |
| 8:30 – 9:00 am | Welcoming addresses: <i>Governor Knowles (confirmed)</i> Senator Ted Stevens |
| 9:00 – 9:45 am | Talk 1: Effects of large-scale climate variability on the carrying capacity of Alaska's oceans and watersheds. <i>Steve Hare (carrying capacity) – (tentative) and Nate Mantua (variability) – (invited)</i> |
| 9:45 – 10:15 am | Talk 2: Status and trends of Alaska's marine resources: fish, birds, and mammals. <i>Doug DeMaster and Alan Springer (both confirmed)</i> |

- 10:15 – 10:45 am Break
- 10:45 – 11:15 am Talk 3: Effects of persistent pollutants and heavy metals on fish and wildlife and subsistence and commercial uses. *Carl Hild (Alaska) and Mike Smolen (World Wildlife Fund – natl., global) – (both confirmed)*
- 11:15 am - noon Talk 4: Alaska demographics: The changing landscape of human use of Alaska's oceans & watersheds. *Steve Colt (UAA) and Henry Huntington (both confirmed)*
- 12:15 – 1:30 pm Lunch
Keynote address: Alaska's Oceans & Watersheds in a Global Context. *Jane Lubchenco (tentative)*
- 1:30 – 2:30 pm Panel 1: Why are some salmon populations declining, and others increasing? John White & Anne Hollowed have lead.
- 2:30 – 3:30 pm Panel 2: Why are some species of other marine fish (groundfish, forage fish, shellfish) declining, and others increasing? John White & Anne Hollowed have lead.
- 3:30 – 4:00 pm Break
- 4:00 – 5:00 pm Panel 3: What are the factors involved in the decline of mammals and birds? Rosa Meehan has lead
Vernon Byrd – birds (confirmed)
Lloyd Lowry or Tom Loughlin – marine mammals
John Piatt – ecosystem/process changes (confirmed)
Caleb Pungawi – subsistence/rural perspective
- 5:00 – 6:30 pm Reception

DAY TWO

- 8:00 – 9:00 am Panel 4: What are the sources of contaminants in Alaska's marine resources; what pathways do they take to enter the food web; and what is the likelihood of their existence? Greg Kellogg and Michele Brown have lead
- 9:00 – 10:00 am Panel 5: How will changing technology further our knowledge of how Alaska's Oceans and Watersheds function ecologically? Molly McCammon and Vera Alexander have lead.
Marcia McNutt – underwater (tentative confirmed)

Fred Grassle – ocean observations (invited)
Jennifer Nielsen – tagging (confirmed)
Patrick Simpson – hydroacoustics (confirmed)
Eric Lindstrom – remote sensing (invited)

| | |
|------------------|---|
| 10:00 – 10:30 am | Break |
| 10:30 – 11:30 am | Panel 6: Ecosystem-based management: What does it mean and how do we get there in Alaska? Rob Bosworth and Clarence Pautzke have lead. |
| 11:30 – 12:30 | Panel 7: Ocean and watershed policies and governance: what changes are needed? Clarence Pautzke and Rob Bosworth have lead. |
| 12:30 – 1:30 pm | Lunch provided Keynote - ? |
| 1:30 – 2:00 pm | Signing of Memorandum of Agreement among oceans and watersheds monitoring and research funding entities to institutionalize additional cooperation and collaboration. Concluding Remarks |
| 2:00 – 4:00 pm | First joint meeting of NPRB, EVOS Trustee Council, Northern Fund |
| 4:00 pm | Adjourn |

Talks are presentations of invited papers. Papers will be published in Alaska's Oceans and Watersheds Status Report, to be published in October 2002. Authors will be contracted for a specified amount, as well as travel and per diem.

Panels will consist of scientists, managers and stakeholders. The panel moderators will summarize each panel for the Status Report, highlighting issues and recommendations. Presenters will receive travel & per diem.

Exxon Valdez Oil Spill Trustee Council

441 W. 5th Ave., Suite 500 • Anchorage, Alaska 99501-2340 • 907/278-8012 • fax 907/276-7178



MEMORANDUM

TO: Trustee Council

THROUGH: Molly McCann
Executive Director

FROM: Debbie Hennigh
Special Assistant

DATE: February 12, 2002

RE: Quarterly Report for the Period Ending December 31, 2001

The attached reports consolidate the financial information submitted by the agencies for the quarter ending December 31, 2001. Fish and Wildlife Service did not provide financial data due to the court order prohibiting Internet access.

The first report (Table 1) is a summary of activity by restoration category. This report reflects the total adjusted authorization and the total expended/obligated by Work Plan year and restoration category.

The second report (Table 2) displays the financial information by Fiscal Year. This report is used to determine what portion of the unexpended/unobligated balance or lapse is available to off set future court requests. Included are adjustments to reflect unreported interest and other revenue. It is estimated that \$4,189,084 is available to off set future court requests. This estimate includes lapse associated with Fiscal Years 1992 through 2001 and unobligated funds associated with other authorizations for which the purpose has been accomplished.

The third report (Table 3) is a summary of financial information associated with the 2002 Work Plan.

If you have any questions regarding the information provided, please call .

Attachments

Cc: Agency Liaisons
Bob Baldauf
Bruce Nesslage

Exxon Valdez Oil Spill Trustee Council
Quarterly Financial Report As of September 30, 2001
Category - Table 1

| Category | 92' Work Plan | | | 93' Work Plan | | | 94' Work Plan | | | 95' Work Plan | | |
|-------------------------|------------------------|--------------------|-------------------|------------------------|--------------------|-------------------|------------------------|--------------------|-------------------|------------------------|--------------------|-------------------|
| | Adjusted Authorization | Expended/Obligated | Percent Obligated | Adjusted Authorization | Expended/Obligated | Percent Obligated | Adjusted Authorization | Expended/Obligated | Percent Obligated | Adjusted Authorization | Expended/Obligated | Percent Obligated |
| General Restoration | 4,103,070 | 3,793,459 | 92.45% | 3,126,013 | 2,172,316 | 69.49% | 5,248,300 | 3,169,392 | 60.39% | 5,232,695 | 4,436,734 | 84.79% |
| Monitoring | | | | | | | 2,883,118 | 2,571,396 | 89.19% | 3,080,926 | 2,460,924 | 79.88% |
| Research | | | | | | | 8,640,710 | 8,085,273 | 93.57% | 10,726,431 | 10,107,500 | 94.23% |
| Monitoring and Research | 2,237,788 | 2,206,587 | 98.61% | 4,204,925 | 3,626,649 | 86.25% | 417,200 | 335,717 | 80.47% | | | |
| Damage Assessment | 7,807,100 | 5,740,168 | 73.52% | 1,991,807 | 1,570,900 | 78.87% | 0 | 0 | 0.00% | 0 | 0 | 0.00% |
| sub-total | 14,147,958 | 11,740,215 | 82.98% | 9,322,745 | 7,369,866 | 79.05% | 17,189,328 | 14,161,778 | 82.39% | 19,040,052 | 17,005,158 | 89.31% |
| Habitat Protection | 0 | 0 | 0.00% | 486,200 | 156,760 | 32.24% | 3,747,292 | 1,656,323 | 44.20% | 2,757,322 | 2,231,447 | 80.93% |
| Administration | 5,076,100 | 4,291,788 | 84.55% | 4,136,052 | 2,647,818 | 64.02% | 4,813,880 | 4,008,303 | 83.27% | 4,207,026 | 3,171,447 | 75.38% |
| Total | 19,224,058 | 16,032,003 | 83.40% | 13,944,997 | 10,174,444 | 72.96% | 25,750,500 | 19,826,404 | 76.99% | 26,004,400 | 22,408,052 | 86.17% |
| | | | | | | | | | | | | |
| Category | 96' Work Plan | | | 97' Work Plan | | | 98' Work Plan | | | 99' Work Plan | | |
| | Adjusted Authorization | Expended/Obligated | Percent Obligated | Adjusted Authorization | Expended/Obligated | Percent Obligated | Adjusted Authorization | Expended/Obligated | Percent Obligated | Adjusted Authorization | Expended/Obligated | Percent Obligated |
| General Restoration | 4,133,410 | 3,739,517 | 90.47% | 3,812,538 | 3,575,827 | 93.79% | 2,413,185 | 2,250,586 | 93.26% | 2,396,789 | 2,298,679 | 95.91% |
| Monitoring | 1,496,871 | 1,447,703 | 96.72% | 985,022 | 950,137 | 96.46% | 930,911 | 893,145 | 95.94% | 1,282,829 | 1,218,342 | 94.97% |
| Research | 13,208,019 | 12,735,656 | 96.42% | 11,430,632 | 11,183,953 | 97.84% | 10,781,704 | 10,363,109 | 96.12% | 7,966,482 | 7,721,742 | 96.93% |
| sub-total | 18,838,300 | 17,922,876 | 95.14% | 16,228,193 | 15,709,917 | 96.81% | 14,125,800 | 13,506,840 | 95.62% | 11,646,100 | 11,238,763 | 96.50% |
| Habitat Protection | 3,304,100 | 2,045,292 | 61.90% | 1,260,600 | 819,070 | 64.97% | 851,400 | 596,353 | 70.04% | 770,400 | 601,716 | 78.10% |
| Administration | 3,418,500 | 2,979,622 | 87.16% | 2,938,207 | 2,662,617 | 90.62% | 2,796,300 | 2,531,047 | 90.51% | 2,495,700 | 2,323,967 | 93.12% |
| Total | 25,560,900 | 22,947,790 | 89.78% | 20,427,000 | 19,191,604 | 93.95% | 17,773,500 | 16,634,240 | 93.59% | 14,912,200 | 14,164,446 | 94.99% |
| | | | | | | | | | | | | |
| Category | 00' Work Plan | | | 01' Work Plan | | | 02' Work Plan | | | | | |
| | Adjusted Authorization | Expended/Obligated | Percent Obligated | Adjusted Authorization | Expended/Obligated | Percent Obligated | Adjusted Authorization | Expended/Obligated | Percent Obligated | Adjusted Authorization | Expended/Obligated | Percent Obligated |
| General Restoration | 940,657 | 825,215 | 87.73% | 985,524 | 961,872 | 97.60% | 528,683 | 1,232 | 0.23% | | | |
| Monitoring | 1,396,603 | 1,353,262 | 96.90% | 1,335,666 | 1,332,511 | 99.76% | 649,364 | 136,583 | 21.03% | | | |
| Research | 6,071,439 | 5,985,425 | 98.58% | 3,624,510 | 3,453,003 | 95.27% | 3,314,454 | 284,066 | 8.57% | | | |
| sub-total | 8,408,700 | 8,163,902 | 97.09% | 5,945,700 | 5,747,386 | 96.66% | 4,492,500 | 421,881 | 9.39% | | | |
| Habitat Protection | 405,800 | 359,858 | 88.68% | 268,100 | 210,215 | 78.41% | 161,800 | 19,624 | 12.13% | | | |
| Administration | 2,033,900 | 1,872,905 | 92.08% | 1,500,200 | 1,454,595 | 96.96% | 1,561,200 | 280,453 | 17.96% | | | |
| Total | 10,848,400 | 10,396,665 | 95.84% | 7,714,000 | 7,412,196 | 96.09% | 6,215,500 | 721,958 | 11.62% | | | |

Exxon Valdez Oil Spill Trustee Council
Quarterly Report as of December 31, 2001
Summary - Table 2

DRAFT

| WORK PLAN AND ASSOCIATED PROJECTS | | | | | | | | | | |
|--|--------------------|----------------|------------------------|--------------------|------------------|------------------|---------------------|-------------------|------------------|-------------------|
| Fiscal Year | Authorized | Adjustments | Adjusted Authorization | EVOS Expenditures | RSA Expenditures | Obligations | Unobligated Balance | EVOS Lapse | Federal Lapse | State Lapse |
| 1992 | 19,211,000 | 13,058 | 19,224,058 | 13,311,903 | 2,720,100 | 0 | 5,912,155 | 5,912,155 | 2,292,119 | 3,620,036 |
| 1993 | 13,963,000 | -18,003 | 13,944,997 | 10,174,444 | | 0 | 3,770,553 | 3,770,553 | 1,752,480 | 2,018,073 |
| 1994 | 25,750,500 | 0 | 25,750,500 | 19,826,404 | | 0 | 5,924,096 | 3,712,996 | 1,336,041 | 2,376,955 |
| 1995 | 26,004,400 | 0 | 26,004,400 | 22,408,052 | | 0 | 3,596,348 | 3,596,348 | 880,818 | 2,715,530 |
| 1996 | 25,560,900 | 0 | 25,560,900 | 22,947,790 | | 0 | 2,613,110 | 2,613,110 | 921,208 | 1,691,902 |
| 1997 | 19,827,600 | -5,379 | 19,822,221 | 18,605,195 | | 0 | 1,217,026 | 1,217,026 | 536,176 | 680,850 |
| 1998 | 17,281,600 | 0 | 17,281,600 | 16,250,176 | | 0 | 1,031,424 | 1,031,424 | 377,369 | 654,055 |
| 1999 | 14,591,200 | 0 | 14,591,200 | 13,869,472 | | 0 | 721,728 | 726,422 | 320,528 | 405,894 |
| 2000 | 10,816,100 | 32,300 | 10,848,400 | 10,019,910 | | 376,755 | 451,735 | 451,735 | 194,060 | 257,679 |
| Unreserved Fund Balance a/o 9/30/00 (Unreserved amount per audit minus unreported interest + lapse) | | | | | | | | 3,829,216 | 216,740 | 3,612,476 |
| 2001 | 7,702,300 | 11,700 | 7,714,000 | 6,850,609 | | 561,587 | 301,804 | 301,804 | 106,369 | 195,435 |
| 2002 | 5,820,200 | 395,300 | 6,215,500 | 426,846 | | 295,112 | 5,493,542 | | | |
| TOTAL | 186,528,800 | 428,976 | 186,957,776 | 154,690,801 | 2,720,100 | 1,233,454 | 31,033,521 | 27,162,789 | 8,933,908 | 18,228,884 |
| OTHER AUTHORIZATIONS | | | 378,729,393 | 368,065,278 | | 3,785,998 | 6,878,117 | 680,332 | 307,364 | 372,968 |
| Total Reported Lapse Adjustments (Through Court Request #45, Investment Fund Notice #1, & Court Notice #10) | | | | | | | | 25,472,814 | 8,605,989 | 16,866,825 |
| Unallocated Lapse (1992 through 2001) | | | | | | | | 2,370,307 | 635,283 | 1,735,024 |
| Unallocated Interest (as of 12/31/01) | | | | | | | | 1,785,185 | 538,156 | 1,247,029 |
| Other Revenue (Posters/Symposium Receipts) | | | | | | | | 33,592 | 0 | 0 |
| Total Available to Offset Future Court Requests | | | | | | | | 4,189,084 | 1,173,439 | 2,982,053 |
| Footnote: The Unobligated Balances have been adjusted to reflect the carry forward of projects. This includes \$2,211,100 in FY 94'. | | | | | | | | | | |
| Federal Lapse includes lapse money that has not been received by the NRDAR account as not all agencies have returned lapsed funds. | | | | | | | | | | |
| Other Authorizations: Includes all large and small parcel acquisitions, the Alutiiq Repository, Prince William Sound and Lower Cook Inlet Archaeological Repository (99154), Construction of the Alaska SeaLife Center, Implementation of the Sound Waste Mgt. Plan (97115), Kenai Habitat Restoration & Recreation (97180, 98180, 99180), Alaska SeaLife Center Fish Pass (97179), Chenega-Area Residual Oiling (96291, 97291, 98291), Kodiak Waste Mgt. Plan (99304), Port Graham Hatchery Reconstruction (99405). | | | | | | | | | | |

| Exxon Valdez Oil Spill | | | | | | | | |
|---|--|------------|----------|---------------|--------------|--------------|-----------|-------------|
| For the Period Ending December 31, 2001 | | | | | | | | |
| Fiscal Year 2002 - Table 3 | | | | | | | | |
| Project | | | | Adjusted | A/o 12/31/01 | A/o 12/31/01 | Expended/ | Unobligated |
| Number | Project Description | Authorized | Adjusted | Authorization | Expenditures | Obligations | Obligated | Balance |
| 02012 | Photographic and Acoustic Monitoring of Killer Whales in Prince William Sound and Kenai Fjords | 35,200 | 0 | 35,200 | 0 | 0 | 0 | 35,200 |
| 02052 | Community Involvement/Traditional Ecological Knowledge | 45,000 | 0 | 45,000 | 0 | 0 | 0 | 45,000 |
| 02100 | Public Information, Science Management and Administration* | 1,500,000 | 61,200 | 1,561,200 | 33,741 | 246,712 | 280,453 | 1,280,747 |
| 02126 | Habitat Protection and Acquisition Support | 161,800 | 0 | 161,800 | 6,624 | 13,000 | 19,624 | 142,176 |
| 02144 | Common Murre Population Monitoring | 14,800 | 0 | 14,800 | 0 | 0 | 0 | 14,800 |
| 02159 | Surveys to Monitor Marine Bird Abundance in Prince William Sound during Winter and Summer 2000 | 33,300 | 0 | 33,300 | 0 | 0 | 0 | 33,300 |
| 02163 | Alaska Predator Ecosystem Experiment in Prince William Sound and the Gulf of Alaska (APEX) | 50,000 | 0 | 50,000 | 0 | 0 | 0 | 50,000 |
| 02190 | Construction of a Linkage Map for the Pink Salmon Genome | 43,100 | 124,900 | 168,000 | 0 | 0 | 0 | 168,000 |
| 02195 | Pristane Monitoring in Mussels | 20,000 | 0 | 20,000 | 8,200 | 0 | 8,200 | 11,800 |
| 02210 | Youth Area Watch | 106,100 | 0 | 106,100 | 0 | 0 | 0 | 106,100 |
| 02245 | Community-Based Harbor Seal Management and Biological Sampling | 26,800 | 0 | 26,800 | 0 | 0 | 0 | 26,800 |
| 02247 | Kametolook River Coho Salmon Subsistence Project | 30,800 | 0 | 30,800 | 0 | 0 | 0 | 30,800 |
| 02250 | Project Management | 181,700 | 0 | 181,700 | 11,066 | 0 | 11,066 | 170,634 |
| 02256 | Sockeye Salmon Stocking at Solf Lake | 15,500 | 0 | 15,500 | 0 | 0 | 0 | 15,500 |
| 02290 | Hydrocarbon Database and Interpretation Service | 35,000 | 0 | 35,000 | 18,100 | 0 | 18,100 | 16,900 |
| 02320 | SEA: Printing Final Report | 2,100 | 0 | 2,100 | 0 | 0 | 0 | 2,100 |

| Exxon Valdez Oil Spill | | | | | | | | |
|---|---|------------|----------|---------------|--------------|--------------|-----------|-------------|
| For the Period Ending December 31, 2001 | | | | | | | | |
| Fiscal Year 2002 - Table 3 | | | | | | | | |
| Project | | | | Adjusted | A/o 12/31/01 | A/o 12/31/01 | Expended/ | Unobligated |
| Number | Project Description | Authorized | Adjusted | Authorization | Expenditures | Obligations | Obligated | Balance |
| 02340 | Toward Long-Term Oceanographic Monitoring of the Gulf of Alaska Ecosystem | 77,800 | 0 | 77,800 | 0 | 0 | 0 | 77,800 |
| 02360 | The Exxon Valdez Oil Spill: Guidance for Future Research Activities | 90,100 | 0 | 90,100 | 84,200 | 0 | 84,200 | 5,900 |
| 02395 | Workshop on Nearshore/Intertidal Monitoring | 63,600 | 0 | 63,600 | 0 | 0 | 0 | 63,600 |
| 02396 | Alaska Salmon Shark Assessment | 28,800 | 0 | 28,800 | 13,200 | 0 | 13,200 | 15,600 |
| 02401 | Assessment of Spot Shrimp Abundance in Prince William Sound | 25,500 | 0 | 25,500 | 1,200 | 0 | 1,200 | 24,300 |
| 02404 | Annual Report for Tracking King Salmon at Sea: Migrations, Biology, and Oceanographic Preferences in Prince William Sound | 104,600 | 0 | 104,600 | 36,375 | 0 | 36,375 | 68,225 |
| 02407 | Harlequin Duck Population Dynamics | 68,700 | 0 | 68,700 | 0 | 0 | 0 | 68,700 |
| 02423 | Patterns and Processes of Population Change in Selected Nearshore Vertebrate Predators | 458,400 | 0 | 458,400 | 155,640 | 0 | 155,640 | 302,760 |
| 02441 | Harbor Seal Recovery: Effects of Diet on Lipid Metabolism and Health | 20,200 | 0 | 20,200 | 0 | 0 | 0 | 20,200 |
| 02455 | Gulf Ecosystem Monitoring & Research Program Data System | 105,000 | 0 | 105,000 | 0 | 0 | 0 | 105,000 |
| 02462 | Effects of Disease on Pacific Herring Population Recovery in Prince William Sound | 77,400 | 0 | 77,400 | 0 | 0 | 0 | 77,400 |
| 02476 | Effects of Oiled Incubation Substrate on Pink Salmon Reproduction | 39,800 | 0 | 39,800 | 1,200 | 0 | 1,200 | 38,600 |
| 02479 | Effects of Food Stress on Survival and Reproductive Performance of Seabirds | 55,000 | 0 | 55,000 | 0 | 0 | 0 | 55,000 |
| 02492 | Were Pink Salmon Embryo Studies in Prince William Sound Biased? | 24,000 | 0 | 24,000 | 3,900 | 0 | 3,900 | 20,100 |
| 02535 | EVOS TC Restoration Program Final Report | 52,400 | 0 | 52,400 | 0 | 0 | 0 | 52,400 |
| 02538 | Evaluation of Two Methods to Discriminate Pacific Herring Stocks Along the Northern Gulf of Alaska | 52,900 | 27,500 | 80,400 | 0 | 0 | 0 | 80,400 |
| 02543 | Evaluation of Oil Remaining in the Intertidal from the Exxon Valdez Oil Spill | 113,100 | 0 | 113,100 | 48,800 | 0 | 48,800 | 64,300 |
| 02550 | Alaska Resources Library and Information Services | 93,400 | 0 | 93,400 | 0 | 0 | 0 | 93,400 |

| Exxon Valdez Oil Spill | | | | | | | | |
|---|--|------------|----------|------------------------|---------------------------|--------------------------|---------------------|---------------------|
| For the Period Ending December 31, 2001 | | | | | | | | |
| Fiscal Year 2002 - Table 3 | | | | | | | | |
| Project Number | Project Description | Authorized | Adjusted | Adjusted Authorization | A/o 12/31/01 Expenditures | A/o 12/31/01 Obligations | Expended/ Obligated | Unobligated Balance |
| 02552 | Exchange Between Prince William Sound and the Gulf of Alaska | 102,500 | 0 | 102,500 | 0 | 0 | 0 | 102,500 |
| 02558 | Harbor Seal Recovery (includes bench fees) | 292,300 | 0 | 292,300 | 0 | 0 | 0 | 292,300 |
| 02561 | Evaluating the Feasibility of Developing a Community-Based Forage Fish Sampling Project for GEM | 54,300 | 0 | 54,300 | 0 | 0 | 0 | 54,300 |
| 02574 | Bivalve Recovery on Treated Beaches | 94,800 | 0 | 94,800 | 0 | 0 | 0 | 94,800 |
| 02584 | Airborne Remote Sensing Tools | 78,600 | 0 | 78,600 | 0 | 0 | 0 | 78,600 |
| 02585 | Lingering Oil: Bioavailability & Effects | 296,400 | 0 | 296,400 | 0 | 0 | 0 | 296,400 |
| 02593 | River Otter Synthesis | 32,400 | 0 | 32,400 | 0 | 0 | 0 | 32,400 |
| 02600 | EVOS Synthesis, 1989-2001 | 133,800 | 0 | 133,800 | 0 | 0 | 0 | 133,800 |
| 02603 | Ocean Circulation Model | 80,000 | 0 | 80,000 | 0 | 0 | 0 | 80,000 |
| 02608 | Archiving of Nearshore & Deep Benthic Specimens | 61,600 | 0 | 61,600 | 0 | 0 | 0 | 61,600 |
| 02610 | Kodiak Island Youth Area Watch | 61,800 | 0 | 61,800 | 0 | 0 | 0 | 61,800 |
| 02612 | Marine-Terrestrial Linkages in Kenai River Watershed | 44,600 | 0 | 44,600 | 0 | 0 | 0 | 44,600 |
| 02614 | Monitoring Program for Near-Surface Temperature, Salinity, and Fluorescence in the Northern Pacific Ocean | 38,200 | 0 | 38,200 | 0 | 0 | 0 | 38,200 |
| 02622 | Digital ESI Maps: Cook Inlet/Kenai | 36,600 | 0 | 36,600 | 0 | 0 | 0 | 36,600 |
| 02624 | Ships of Opportunity: Plankton Survey | 120,600 | 0 | 120,600 | 0 | 0 | 0 | 120,600 |
| 02630 | Planning for Long-term Research and Monitoring Program | 63,800 | 240,900 | 304,700 | 4,600 | 35,400 | 40,000 | 264,700 |
| 02636 | Commercial Fishing Management Applications | 50,000 | 0 | 50,000 | 0 | 0 | 0 | 50,000 |
| 02649 | Reconstructing Sockeye Populations in the Gulf of Alaska over the Last Several Thousand Years | 88,100 | 0 | 88,100 | 0 | 0 | 0 | 88,100 |
| 02656 | Retrospective Analysis of Nearshore Marine Communities Based on Analysis of Archaeological Material and Isotopes | 109,900 | 0 | 109,900 | 0 | 0 | 0 | 109,900 |
| 02667 | Effectiveness of Citizens' Environmental Monitoring | 16,700 | 1,200 | 17,900 | 0 | 0 | 0 | 17,900 |
| 02668 | Water Quality and Habitat Database | 16,100 | 0 | 16,100 | 0 | 0 | 0 | 16,100 |
| 02671 | Coordinating Volunteer Vessels of Opportunity to Collect Oceanographic Data in Kachemak Bay and Lower Cook Inlet | 34,800 | 0 | 34,800 | 0 | 0 | 0 | 34,800 |
| 02674 | Continuing Decline of Pigeon Guillemots in the Oiled Portion of Prince William Sound | 60,400 | -60,400 | 0 | 0 | 0 | 0 | 0 |
| | | 5,820,200 | 395,300 | 6,215,500 | 426,846 | 295,112 | 721,958 | 5,493,542 |

Exxon Valdez Oil Spill Trustee Council

441 W. 5th Ave., Suite 500 • Anchorage, Alaska 99501-2340 • 907/278-8012 • fax 907/276-7178

MEMORANDUM



TO: Trustee Council

FROM: Sandra Schubert, Program Coordinator *Sandra Schubert*

THROUGH: Molly McCammon, Executive Director *Molly McCammon*

DATE: February 12, 2002

RE: Quarterly Project Status Summary -- October 1 - December 31, 2001

This memorandum summarizes the status of reports for the quarter ending December 31, 2001, for all restoration projects funded by the Trustee Council for FY 92-01. The memorandum also includes progress updates for FY 02 projects and the status of the 22 NRDA reports that were not final at the time the settlement agreement was reached.

Attachment A summarizes the status of project reports (including NRDA reports) by agency.

Attachment B lists the reports that are significantly behind schedule. Reports are on this list if (1) their due dates have passed and they have not yet been submitted to the Chief Scientist, (2) they were reviewed by the Chief Scientist, returned to the PI for revision longer ago than six months, and have not been revised and resubmitted to the Chief Scientist, or (3) they were submitted to the Chief Scientist for peer review more than six months ago and have not yet been peer reviewed.

Attachment C summarizes activities conducted during the October-December quarter for all projects underway in FY 02.

As of December, 2001, a total of 381 restoration project reports had been peer reviewed and accepted by the Chief Scientist (this is up from 372 reports accepted as of September 30, 2001). Once accepted by the Chief Scientist, reports are submitted to the Alaska Resources Library and Information Services (ARLIS). As of December 31, 355 reports were available to the public through ARLIS and other libraries around the state (this is up from 352 reports available as of September 30, 2001). Please contact the Restoration Office or ARLIS if you would like a list of the reports that are currently available to the public.

My biggest concern continues to be the large number of late reports (see Att. B). A few of these reports date back several years. I would appreciate any help you can provide in seeing that PIs in your agency submit the required project reports.

Status of FY 92 Project Reports as of December 31, 2001

A total of 75 reports are being produced on projects funded in the 1992 Work Plan. These reports are considered "final" reports and are subject to peer review and approval by the Chief Scientist. (NOTE: Reports "in progress" are in peer review, are under revision by the PI in response to peer reviewer comments, or have been revised and are undergoing a second review by the Chief Scientist.)

| <u>Reports Available to Public at ARLIS</u> | <u>Reports Accepted by Chief Scientist but Not Yet Available to Public</u> | <u>Reports in Progress</u> | <u>No Report Yet Submitted</u> |
|---|--|--------------------------------|------------------------------------|
| 74 | 0 | 1 | 0 |

Status of FY 93 Project Reports as of December 31, 2001

A total of 28 final reports are being produced on projects funded in the 1993 Work Plan.

| <u>Reports Available to Public at ARLIS</u> | <u>Reports Accepted by Chief Scientist but Not Yet Available to Public</u> | <u>Reports in Progress</u> | <u>No Report Yet Submitted</u> |
|---|--|--------------------------------|------------------------------------|
| 25 | 1 | 1 | 1 |

Status of FY 94 Project Reports as of December 31, 2001

A total of 37 final reports are being produced on projects funded in the FY 94 Work Plan.

| <u>Reports Available to Public at ARLIS</u> | <u>Reports Accepted by Chief Scientist but Not Yet Available to Public</u> | <u>Reports in Progress</u> | <u>No Report Yet Submitted</u> |
|---|--|--------------------------------|------------------------------------|
| 37 | 0 | 0 | 0 |

Status of FY 95 Project Reports as of December 31, 2001

A total of 53 reports are being produced on projects funded in the FY 95 Work Plan. Beginning with the FY 95 project year, "annual" reports on continuing projects are peer reviewed, but are not required to be rewritten in response to peer review comments. Rather, the peer review comments are to be used to guide future work on the project.

| <u>Reports Available to Public at ARLIS</u> | <u>Reports Accepted by Chief Scientist but Not Yet Available to Public</u> | <u>Reports in Progress</u> | <u>No Report Yet Submitted</u> |
|---|--|--------------------------------|------------------------------------|
| 53 | 2 | 0 | 0 |

Status of FY 96 Projects as of December 31, 2001

A total of 50 reports are being produced on projects funded in the FY 96 Work Plan.

| <u>Reports Available to Public at ARLIS</u> | <u>Reports Accepted by Chief Scientist but Not Yet Available to Public</u> | <u>Reports in Progress</u> | <u>No Report Yet Submitted</u> |
|---|--|--------------------------------|------------------------------------|
| 46 | 2 | 0 | 2 |

Status of FY 97 Projects as of December 31, 2001

A total of 53 reports are being produced on projects funded in the FY 97 Work Plan.

| <u>Reports Available to Public at ARLIS</u> | <u>Reports Accepted by Chief Scientist but Not Yet Available to Public</u> | <u>Reports in Progress</u> | <u>No Report Yet Submitted</u> |
|---|--|--------------------------------|------------------------------------|
| 53 | 1 | 1 | 0 |

Status of FY 98 Projects as of December 31, 2001

A total of 46 reports are being produced on projects funded in the FY 98 Work Plan.

| <u>Reports Available to Public at ARLIS</u> | <u>Reports Accepted by Chief Scientist but Not Yet Available to Public</u> | <u>Reports in Progress</u> | <u>No Report Yet Submitted</u> |
|---|--|--------------------------------|------------------------------------|
| 37 | 4 | 5 | 0 |

Status of FY 99 Projects as of December 31, 2001

A total of 55 reports are being produced on projects funded in the FY 99 Work Plan.

| <u>Reports Available to Public at ARLIS</u> | <u>Reports Accepted by Chief Scientist but Not Yet Available to Public</u> | <u>Reports in Progress</u> | <u>No Report Yet Submitted</u> |
|---|--|--------------------------------|------------------------------------|
| 26 | 12 | 11 | 6 |

Status of FY 00 Projects as of December 31, 2001

A total of 44 reports are being produced on projects funded in the FY 99 Work Plan.

| <u>Reports Available to Public at ARLIS</u> | <u>Reports Accepted by Chief Scientist but Not Yet Available to Public</u> | <u>Reports in Progress</u> | <u>No Report Yet Submitted</u> |
|---|--|--------------------------------|------------------------------------|
| 4 | 10 | 17 | 13 |

Status of FY 01 Projects as of December 31, 2001

For most FY 01 projects, reports are due April 15, 2002. To date, 4 reports have been submitted for peer review; one of these has been accepted by the Chief Scientist.

Status of FY 02 Projects as of December 31, 2001

A project-by-project summary of activities conducted during the October-December quarter is presented in **Attachment C**.

Status of NRDA Reports as of December 31, 2001

A total of 22 NRDA reports that were not final at the time the settlement agreement was reached are in the process of being finalized.

| <u>Reports Available to Public at ARLIS</u> | <u>Reports Accepted by Chief Scientist but Not Yet Available to Public</u> | <u>Reports in Progress</u> | <u>No Report Yet Submitted</u> |
|---|--|--------------------------------|------------------------------------|
| 21 | 0 | 1 | 0 |

ATTACHMENT A**Summary of Project Report Status as of December 31, 2001****1992 WORK PLAN**

| AGENCY | NUMBER OF REPORTS | Not Yet Submitted to Chief Sci. | In Progress | Peer Rev'd/ Accepted by Chief Scientist | Available to Public at ARLIS |
|--------------|-------------------|---------------------------------|-------------|---|------------------------------|
| ADEC | 2 | 0 | 0 | 2 | 2 |
| ADFG | 26 | 0 | 1 | 25 | 25 |
| ADNR | 1 | 0 | 0 | 1 | 1 |
| DOI | 33 | 0 | 0 | 33 | 33 |
| NOAA | 11 | 0 | 0 | 11 | 11 |
| USFS | 2 | 0 | 0 | 2 | 2 |
| TOTAL | 75 | 0 | 1 | 74 | 74 |

1993 WORK PLAN

| AGENCY | NUMBER OF REPORTS | Not Yet Submitted to Chief Sci. | In Progress | Peer Rev'd/ Accepted by Chief Scientist | Available to Public at ARLIS |
|--------------|-------------------|---------------------------------|-------------|---|------------------------------|
| ADEC | 2 | 0 | 0 | 2 | 2 |
| ADFG | 12 | 1 | 1 | 10 | 10 |
| ADNR | 0 | 0 | 0 | 0 | 0 |
| DOI | 9 | 0 | 0 | 9 | 9 |
| NOAA | 3 | 0 | 0 | 3 | 3 |
| USFS | 2 | 0 | 0 | 2 | 1 |
| TOTAL | 28 | 1 | 1 | 26 | 25 |

1994 WORK PLAN

| AGENCY | NUMBER OF REPORTS | Not Yet Submitted to Chief Sci. | In Progress | Peer Rev'd/ Accepted by Chief Scientist | Available to Public at ARLIS |
|--------------|-------------------|---------------------------------|-------------|---|------------------------------|
| ADEC | 1 | 0 | 0 | 1 | 1 |
| ADFG | 19 | 0 | 0 | 19 | 19 |
| ADNR | 2 | 0 | 0 | 2 | 2 |
| DOI | 6 | 0 | 0 | 6 | 6 |
| NOAA | 5 | 0 | 0 | 5 | 5 |
| USFS | 4 | 0 | 0 | 4 | 4 |
| TOTAL | 37 | 0 | 0 | 37 | 37 |

ATTACHMENT A

Summary of Project Report Status as of December 31, 2001

1995 WORK PLAN

| AGENCY | NUMBER OF REPORTS | Not Yet Submitted to Chief Sci. | In Progress | Peer Rev'd/ Accepted by Chief Scientist | Available to Public at ARLIS |
|--------------|----------------------|---------------------------------------|-------------|---|------------------------------------|
| ADEC | 4 | 0 | 0 | 3 | 4 |
| ADFG | 27 | 0 | 0 | 26 | 27 |
| ADNR | 1 | 0 | 0 | 1 | 1 |
| DOI | 7 | 0 | 0 | 7 | 7 |
| NOAA | 8 | 0 | 0 | 8 | 8 |
| USFS | 6 | 0 | 0 | 6 | 6 |
| TOTAL | 53 | 0 | 0 | 51 | 53 |

1996 WORK PLAN

| AGENCY | NUMBER OF REPORTS | Not Yet Submitted to Chief Sci. | In Progress | Peer Rev'd/ Accepted by Chief Scientist | Available to Public at ARLIS |
|--------------|----------------------|---------------------------------------|-------------|---|------------------------------------|
| ADEC | 1 | 0 | 0 | 1 | 0 |
| ADFG | 27 | 2 | 0 | 25 | 25 |
| ADNR | 3 | 0 | 0 | 3 | 3 |
| DOI | 3 | 0 | 0 | 3 | 3 |
| NOAA | 9 | 0 | 0 | 9 | 9 |
| USFS | 7 | 0 | 0 | 7 | 6 |
| TOTAL | 50 | 2 | 0 | 48 | 46 |

1997 WORK PLAN

| AGENCY | NUMBER OF REPORTS | Not Yet Submitted to Chief Sci. | In Progress | Peer Rev'd/ Accepted by Chief Scientist | Available to Public at ARLIS |
|--------------|----------------------|---------------------------------------|-------------|---|------------------------------------|
| ADEC | 2 | 0 | 0 | 2 | 2 |
| ADFG | 28 | 0 | 1 | 27 | 28 |
| ADNR | 4 | 0 | 0 | 4 | 4 |
| DOI | 6 | 0 | 0 | 6 | 6 |
| NOAA | 7 | 0 | 0 | 7 | 7 |
| USFS | 6 | 0 | 0 | 6 | 6 |
| TOTAL | 53 | 0 | 1 | 52 | 53 |

ATTACHMENT A

Summary of Project Report Status as of December 31, 2001

1998 WORK PLAN

| AGENCY | NUMBER OF REPORTS | Not Yet Submitted to Chief Sci. | In Progress | Peer Rev'd/ Accepted by Chief Scientist | Available to Public at ARLIS |
|--------------|----------------------|---------------------------------------|-------------|---|------------------------------------|
| ADEC | 1 | 0 | 1 | 0 | 0 |
| ADFG | 21 | 0 | 2 | 19 | 17 |
| ADNR | 2 | 0 | 0 | 2 | 2 |
| DOI | 6 | 0 | 0 | 6 | 6 |
| NOAA | 12 | 0 | 0 | 12 | 10 |
| USFS | 4 | 0 | 2 | 2 | 2 |
| TOTAL | 46 | 0 | 5 | 41 | 37 |

1999 WORK PLAN

| AGENCY | NUMBER OF REPORTS | Not Yet Submitted to Chief Sci. | In Progress | Peer Rev'd/ Accepted by Chief Scientist | Available to Public at ARLIS |
|--------------|----------------------|---------------------------------------|-------------|---|------------------------------------|
| ADEC | 1 | 0 | 0 | 1 | 0 |
| ADFG | 24 | 2 | 7 | 16 | 14 |
| ADNR | 4 | 0 | 1 | 3 | 2 |
| DOI | 10 | 0 | 2 | 8 | 2 |
| NOAA | 11 | 3 | 0 | 7 | 6 |
| USFS | 5 | 1 | 1 | 3 | 2 |
| TOTAL | 55 | 6 | 11 | 38 | 26 |

2000 WORK PLAN

| AGENCY | NUMBER OF REPORTS | Not Yet Submitted to Chief Sci. | In Progress | Peer Rev'd/ Accepted by Chief Scientist | Available to Public at ARLIS |
|--------------|----------------------|---------------------------------------|-------------|---|------------------------------------|
| ADEC | 2 | 0 | 1 | 1 | 0 |
| ADFG | 17 | 4 | 8 | 5 | 2 |
| ADNR | 0 | 0 | 0 | 0 | 0 |
| DOI | 9 | 4 | 0 | 5 | 1 |
| NOAA | 14 | 4 | 8 | 2 | 0 |
| USFS | 1 | 0 | 0 | 1 | 1 |
| RO | 1 | 1 | 0 | 0 | 0 |
| TOTAL | 44 | 13 | 17 | 14 | 4 |

ATTACHMENT A

Summary of Project Report Status as of December 31, 2001

NRDA REPORT COMPLETION

| AGENCY | NUMBER OF REPORTS | Not Yet Submitted to Chief Sci. | In Progress | Peer Rev'd/ Accepted by Chief Scientist | Available to Public at ARLIS |
|--------------|----------------------|---------------------------------------|-------------|---|------------------------------------|
| ADEC | 1 | 0 | 0 | 1 | 1 |
| ADFG | 17 | 0 | 1 | 16 | 16 |
| DOI | 2 | 0 | 0 | 2 | 2 |
| NOAA | 2 | 0 | 0 | 2 | 2 |
| TOTAL | 22 | 0 | 1 | 21 | 21 |

ATTACHMENT B
Overdue Reports (as of 1/31/02)

| Agency | Project Number | PI | Final or Annual | Project Title | Status of Report |
|--------|----------------|-----------------------|-----------------|--|--|
| ADEC | 98291 | See | Final | Chenega shoreline oiling | Peer reviewed; returned to PI for revision 2/18/00. |
| ADFG | FS13 | Baker | Final | Effects of hydrocarbons on bivalves | Peer reviewed; returned to PI for revision 11/11/98. Revision was expected early summer 2000; now expected 2/15/02. |
| ADFG | 93033-1 | Rothe | Final | Harlequin duck - Afognak habitat assessment/PWS production | Peer reviewed; returned to PI for revision 11/14/95; most recent due date was 7/1/98; then expected 5/31/00; still not received. |
| ADFG | 93033-2 | Rothe | Final | Harlequin restoration | Never submitted; most recent due date was 7/1/98; then expected 5/31/00; still not received. |
| ADFG | 96258A-1 | Edmundson | Final | Sockeye: Kenai | Never submitted; was due 1/1/98 (with manuscript). PI retired 6/1/00; Edmundson has been assigned as new PI and will complete report as part of his PhD directed study--expect to submit January 2002. |
| ADFG | 96258A-2 | Swanton | Final | Sockeye: Kodiak | Never submitted; was due 10/30/97; then expected 3/31/00; then expected 6/20/01; now expected 5/1/02. |
| ADFG | 98191A | Willette | Final | Oil-related embryo mortality | Peer reviewed; returned to PI for revision 4/20/00. Now expected 5/1/02. |
| ADFG | 99139A2 | Dickson | Final | Port Dick restoration | Peer reviewed; returned to PI for revision 12/15/00. |
| ADFG | 99162B | Kennedy | Ms. | Herring disease | 4 manuscripts were due 9/30/00; 3 not submitted. |
| ADFG | 99252-1 | L. Seeb | Final | Genetics project: pollock component | Never submitted; was due 9/30/99; then expected 4/30/00; still not received. |
| ADFG | 99252-2 | L. Seeb | Final | Genetics project: black rockfish component | Never submitted; was due 1/31/00; then expected 6/30/00; still not received. |
| ADFG | 99263 | Hall | Annual | Port Graham streams | Peer reviewed; returned to PI for revision 9/1/00. |
| ADFG | 99375 | E. Brown | Final | Herring egg distribution | Due 9/30/00; 2 of 4 chapters (ms.) were submitted 12/9/00; peer review on hold until complete report submitted--now expected 6/30/01. |
| ADFG | 00052 | P. Brown-Schwalenberg | Annual | Community involvement | Never submitted; was due 5/1/01. |

ATTACHMENT B
Overdue Reports (as of 1/31/02)

| | | | | | |
|------|--------|--------------|--------|--|--|
| ADFG | 00263 | Meganack | Final | Port Graham streams | Never submitted; was due 12/15/00. |
| ADFG | 00273 | Rosenberg | Annual | Surf scoters | Never submitted; was due 9/30/01. |
| ADFG | 00371 | Schell | Final | Harbor seal isotopes | Never submitted; was due 11/15/01 (extended from 9/30/01). |
| ADFG | 00509 | Small, Frost | Final | Harbor seal long-term monitoring | Peer reviewed; returned to PI for revision 6/18/01. |
| ADFG | 01064 | Frost | Ms. | Harbor seals | 5 ms. due in March, June, & Sept. 2001 are overdue |
| ADFG | 01385 | Schoch | Final | Monitor Kachemak Bay | Never submitted; was due 9/30/01. |
| ADFG | 01484 | Simeone | Video | Subsistence - intertidal | Never submitted; was due 12/15/01. |
| ADNR | 99007A | Bittner | N'book | Archaeology | Restoration Notebook Series was due 4/15/00; never submitted. Bittner has taken over for Reger, who retired. |
| DOI | 99163 | Piatt | Final | APEX-Subproject M | Never submitted; was due 9/30/00. |
| DOI | 99459 | Irvine | Final | GOA residual oil | Peer reviewed and returned to PI for revision 3/27/01. |
| DOI | 00327 | Divoky | Final | Pigeon guillemots | Never submitted; was due 9/30/01. |
| DOI | 00501 | Piatt | Final | Seabird monitoring protocols | Never submitted; was due 9/30/00; due date extended to 10/31/00; now expect 3/31/02. |
| DOI | 01338 | Piatt | Final | Murre/kittiwake survival | Never submitted; was due 9/15/01; now expect 9/15/02. |
| NOAA | 98347 | Heintz | Annual | Fatty acids | Report accepted but letter requested 3/20/00; response not received; now expected 2/1/01. |
| NOAA | 99090 | Carls | Final | Mussel bed monitoring | Never submitted due to loss of 2 ABL personnel; was due 4/15/00; due date was extended to 8/25/00; then expected 1/1/01; then expected 2/02; now expected 5/02. (ms. also not submitted) |
| NOAA | 99163 | Duffy, et al | Final | APEX | Never submitted; was due 9/30/00 (all done except Piatt's subproject M). |
| NOAA | 99347 | Heintz | Final | Fatty acids & lipids RE diet composition | Never submitted; was due 9/30/00; now expect 10/30/01. |
| NOAA | 00048 | Ruggerone | Ms. | Sockeye salmon | 2 manuscripts were due 12/99; then expected 11/15/00 and 3/01; nothing received yet. |

ATTACHMENT B **Overdue Reports (as of 1/31/02)**

| | | | | | |
|---|---------|--------------|--------|--|--|
| NOAA | 00195 | Short | Annual | Pristane | Never submitted; was due 4/15/01; then expected 7/1/01. |
| NOAA | 00330 | Pauly & Okey | Ms. | Mass-balance model | 4 manuscripts were due 9/30/00; 1 not submitted. |
| NOAA | 00393 | Kline | Annual | PWS food webs | Never submitted; was due 4/15/01. |
| NOAA | 00454 | Rice | Final | Salmon natal habitats | Never submitted; was due 9/30/01. |
| NOAA | 00510 | McDonald | Ms. | Intertidal monitoring recommendations | Two manuscripts were due 4/15/00; one never submitted. |
| NOAA | 00598 | Short | Ms. | EVO vs. regional background hydrocarbons | Never submitted; was due 8/00; then expected 7/1/01; now expected 5/02. |
| NOAA | 01163 | Duffy, et al | 14 ms. | APEX synthesis ms. | Never submitted; were due 9/30/01. |
| NOAA | 01551 | Hansen | Final | Algal checklist | Never submitted; was due 10/1/01. |
| USFS | 98145 | Reeves | Final | Cutts & dollys: anadromous forms | Peer reviewed; returned to PI for revision 12/15/00; was expected 1/02; now expected 4/02. |
| USFS | 99339-2 | Suring | Final | Human use model & recommendations | Never submitted; was due 12/31/99, now expected 4/1/02. PI transferred out of state and is completing on own time. |
| The following reports were submitted to the Chief Scientist for peer review more than 6 months ago: | | | | | |

| | | | | |
|-------|--------|-------------------------|--|-----------------|
| | | | | Date submitted: |
| 99188 | Final | Otolith marking | | 9/20/00 |
| 01468 | Final | FEATS | | 1/31/01 |
| 00401 | Annual | Spot shrimp | | 5/29/01 |
| 01599 | Annual | Yakataga oil seeps | | 6/6/01 |
| 01610 | Annual | Kodiak Youth Area Watch | | 7/3/01 |

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|--|--------------------------------------|--------------------|
| 02012-BAA | Photographic and Acoustic Monitoring of Killer Whales in Prince William Sound and Kenai Fjords | C. Matkin/North Gulf Oceanic Society | NOAA |

Project Tasks to be Completed this Quarter

UPDATE NOT PROVIDED.

Oct-Dec

Analyze photos from 2001 fieldwork
Input data into GIS system

Jan - March

Summarize monitoring field work for 2001
Analyze killer whale calls from 2001
Analyze and interpret GIS data for Kenai Fjords region
Attend Annual Workshop (1/22-25)

April-June

Analyze remot hydrophone data collected through 2001
Final report due 4/30/02

July-Sept

Conferences

November 2001: Biennial Conference on Biology of Marine Mammals, Vancouver, BC (funded in FY 01)

Publications

Matkin, et al. Populations of killer whales in PWS 11 years after EVOS; submit to Marine Mammal Science (carried over from FY 01)

| | | | |
|-------|--|-----------------------------|------|
| 02052 | Natural Resource Management and Stewardship Capacity Building | P. Brown- Schwalenberg/CRRC | ADFG |
|-------|--|-----------------------------|------|

Project Tasks to be Completed this Quarter

NOTE: PROJECT DEFERRED IN AUGUST (EXCEPT FOR SMALL AMOUNT OF INTERIM FUNDS THAT HAVE BEEN AUTHORIZED TO PAY TRAVEL EXPENSES FOR COMMUNITY FACILITATORS TO ATTEND ANNUAL RESTORATION WORKSHOP) & AGAIN IN DECEMBER.

Jan-March

Community facilitators attend Annual Restoration Workshop (1/22-25)

April-June

July-Sept

FY 00 tasks not completed during FY 00 (Molly sent letter to Patty 11/29/00):

- Identify species on which to develop monitoring programs at local level
- Pilot communities talk to adjacent landholders regarding stewardship & mgt.
- Develop draft GEM Community Integration Plan
- Work with non-pilot communities to develop tribal natural resource mgt. programs

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|--|------------------------------|--------------------|
| 02100 | Public Information, Science Management, and Administration | All Trustee Council Agencies | ALL |

Project Tasks to be Completed this Quarter

N/A

| | | | |
|-------|--|--------------------|------------------|
| 02126 | Habitat Protection and Acquisition Support | ADNR, DOI/USFWS, U | ADNR USFS DOI |
|-------|--|--------------------|------------------|

Project Tasks to be Completed this Quarter

In FY 02, work is expected on the following parcels:

Small parcels:

Kodiak Tax & Larsen Bay Shareholder parcels: KAP 1098, 2000, 2019, 2042, 2069, and 6 not yet identified
USFS & UNIVERSITY CONTINUE NEGOTIATIONS OVER SUBSURFACE-Valdez Duck Flats: PWS 05
REQUEST FOR LEGISLATIVE AUTHORITY SUBMITTED IN GOVERNOR'S BUDGET-Valdez Duck Flats: PWS 06
USFS & UNIVERSITY CONTINUE NEGOTIATIONS OVER PURCHASE AGREEMENT-Jack Bay: PWS 1010
REQUEST FOR LEGISLATIVE AUTHORITY SUBMITTED IN GOVERNOR'S BUDGET-Kenai parcels: KEN 294 Anchor
River, KEN 309 Ninilchik River
Alaska Peninsula parcels: KAP 281 3 Saints Bay, KAP 283 Chiniak Bay, KAP 285 Hook Bay

Large parcels:

Koniag Phase II with exchange
English Bay Phase II
AKI Phase IV, exclusion V
Old Harbor exchange
WORKING ON TITLE CONTRACT-AJV final closing (part 2) and subsurface
Karluk
Eyak final closing (Power Creek)
Tatitlek exchange

| | | | |
|-------|------------------------------------|-------------------|-----|
| 02144 | Common Murre Population Monitoring | D. Roseneau/USFWS | DOI |
|-------|------------------------------------|-------------------|-----|

Project Tasks to be Completed this Quarter

Oct-Dec

Jan-Mar

Attend Annual Workshop (1/22-25)
Submit draft final report for in-house review

April-June

Submit final report to Chief Scientist (4/15/02)

July-Sept

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|--|-----------------|--------------------|
| 02154 | Support Costs: Archaeological Repository/Display Facilities/Exhibits | J. Bittner/ADNR | ADNR |

Project Tasks to be Completed this Quarter

N/A

| | | | |
|-------|--|----------------|-----|
| 02159 | Surveys to Monitor Marine Bird Abundance in Prince William Sound | D. Irons/USFWS | DOI |
|-------|--|----------------|-----|

Project Tasks to be Completed this Quarter

NOTE: THIS PROJECT WAS APPROVED 12/11/01 CONTINGENT ON A REVISED DPD THAT REDUCES SCOPE TO FINAL REPORT PREPARATION ONLY; REVISED DPD NOT YET RECEIVED.

Oct-Dec

Jan-Mar

April-June

July-Sept

| | | | |
|--------|--|---------------|-----|
| 02163M | APEX: Numerical and Functional Response of Seabirds to Fluctuations in Forage Fish Density | J. Piatt/USGS | DOI |
|--------|--|---------------|-----|

Project Tasks to be Completed this Quarter

June 30

Complete final synthesis manuscripts:

- Role of food supply & environmental variability in regulation of seabird population; Ecological Monographs
- Feeding ecology of common murres & black-legged kittiwakes in relation to food availability; MEPS
- Chick feeding rates, foraging time budgets, & nest site attendance of common murres & black-legged kittiwakes at 3 colonies with differing food regimes; Behavioral Ecology
- Breeding biology of common murres & black-legged kittiwakes in relation to food availability; Ecology
- Spatial associations of seabirds and their prey; MEPS
- Foraging ecology of seabirds in lower Cook Inlet; Speckman PhD dissertation
- Cost of egg production in common murres; Oecologia
- Breeding biology and feeding ecology of horned puffins at Chisik Island; Condor

Sept 30

Submit manuscripts for journal publication

Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|--|----------------------------|--------------------|
| 02190 | Construction of a Linkage Map for the Pink Salmon Genome | F. Allendorf/Univ. Montana | ADFG |

Project Tasks to be Completed this Quarter

Conferences

National meeting (\$900).

Manuscripts (from FY 01)

Lindner, et al. To be submitted to Genetics. Linkage map for pink salmon based on gynogenetic haploids & half-tetrads

by Dec 2001

GENOTYPED ALL 262 EXPERIMENTAL PINK SALMON COLLECTED IN AUG. & SEPT. 2001 AT THREE MICROSATELLITE LOCI (SSA408, OMY301, OTS1). Complete genetic analyses of fry from 1999 cohort samples at time of release from ASLC

Perform morphological analysis of returning adults from 1999 cohort

by Mar 2002

Add markers to the even-year linkage map

April 15, 2002

Submit annual report

by July 2002

Perform genetic analyses of adults from 1999 cohort that return to ASLC

by Sept 2002

Perform data analysis to test for correlations between markers from the linkage map and traits associated with marine survival and fitness in the returns of the 1999 cohort

Submit ms. describing results of marine survival and fitness experiment

Submit ms. comparing odd- and even-year linkage maps

DRAFT

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|--------------------------------|--------------------------|--------------------|
| 02195 | Pristane Monitoring in Mussels | J. Short, P. Harris/NOAA | NOAA |

Project Tasks to be Completed this Quarter

Oct-Dec

DONE-Submit sample collection and pristane concentration data to pristane database

DONE-Compile pink salmon survival data from PWSAC and ADF&G

Jan-March

DONE-Attend Annual Workshop (Jan 22-25)

April-June

July-Sept

-Complete final report

Conferences

2 unidentified scientific meetings (\$2,600)

Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|--|--------------------------------------|--------------------|
| 02210 | Prince William Sound/Lower Cook Inlet Youth Area Watch | R. DeLorenzo/Chugach School District | ADFG |

Project Tasks to be Completed this Quarter

Sept

JASON training (all YAW site coordinators and 5 additional teachers)
DONE-Site teacher orientation
DONE-School site orientation
DONE-Select students for participation

Oct-Dec

DONE-Student orientation & training
DONE-Complete protocol training for teachers
DONE-Prepare weather station at each site

Jan-March

JASON live broadcast (1 coordinator, 2 students)
Coordinator sends data to PIs 3/1/02

April-June

Site teacher follow-up training
Coordinator sends data to PIs 6/1/02
Students complete project reports 6/1/02

July-Sept

Ongoing Student Activities:

Maintain web site
-Bi-monthly mussel collection
-Daily weather station monitoring
-Collect harbor seal samples with local hunters
-Conduct local projects
-Assist in documenting local TEK
-Interact and exchange information with PIs

DRAFT

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|--|---|--------------------|
| 02245 | Community-Based Harbor Seal Management and Biological Sampling | V. Vanek/ADFG, M. Riedel/Alaska Native Harbor Seal Commission | ADFG |

Project Tasks to be Completed this Quarter

NO UPDATE PROVIDED.

Ongoing

Collect biological samples
Process samples

Oct-Dec

Hold training sessions for new community technicians and students

Jan-Mar

Attend Annual Workshop (Jan 22-25)
Produce & distribute newsletter (ANHSC)

April-June

July-Sept

Final report due 9/30/02

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|--|-----------------------------------|--------------------|
| 02247 | Kametolook River Coho Salmon Subsistence Project | J. McCullough, L. Scarbrough/ADFG | ADFG |

Project Tasks to be Completed this Quarter

Oct-Dec -- ALL TASKS DONE

Local assistants conduct stream surveys for coho & report findings to ADFG
ADFG personnel travel to Perryville to capture adult coho & place in holding pens
Stream surveys & genetic /pathological work in local area river system for FTP requirement to transport coho eggs and/or juvenile fish to Kametolook R. and egg boxes
Set up school aquarium
Obtain FTP for school aquarium
Perform maintenance of instream incubation system
Conduct escapement surveys
Perform coho salmon egg take, fertilize eggs, place in incubation boxes (Kametook and a nearby river if FTP allows)
Sample salmon for genetic & pathology tests
Meet with students & community to discuss project
Meet with Chignik RPT/CRAA & Perryville Subsistence Work Group to discuss project

Dec-May

-Local assistants make monthly trips to incubation boxes to inspect condition of boxes & eggs
-ADFG analyze subsistence & commercial harvest data
DID NOT ATTEND-Attend Annual Workshop (Jan. 22-25)
DONE-Attend Chignik Subsistence Work Group meeting (Anchorage)
DONE-Attend Board of Fisheries meeting to discuss Kametolook project (Anchorage or Kodiak)

April-June

Meet with assessment team to evaluate project
-Local assistants monitor boxes for fry release
-Sanitize boxes after fry leaves
-Students release aquarium fry into Kametolook River

July-Sept

-RPT meet in Chignik Bay to review project status & look for other funding sources
Final report due 9/30/02

| | | | |
|-------|--------------------|------------------------------|-----|
| 02250 | Project Management | All Trustee Council Agencies | ALL |
|-------|--------------------|------------------------------|-----|

Project Tasks to be Completed this Quarter

N/A

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|--------------------------------------|------------------|--------------------|
| 02256B-CLO | Sockeye Salmon Stocking at Solf Lake | D. Gillikin/USFS | USFS |

Project Tasks to be Completed this Quarter

Jan

Attend Annual Workshop (Jan 22-25)

Jan-April

Prepare for field season; hire crew

April-July

-Evaluate fishway & monitor returning adult salmon

Sept

Final report due 9/30/02

| | | | |
|-------|---|--------------------------|------|
| 02290 | Hydrocarbon Database and Interpretation Service | J. Short, B. Nelson/NOAA | NOAA |
|-------|---|--------------------------|------|

Project Tasks to be Completed this Quarter

Jan

DONE-Attend Annual Workshop (Jan 22-25)

April 15

-Submit annual report in form of updated release of hydrocarbon data software

Conferences

-Quality Assurance Control/NIST (\$1,400)

| | | | |
|-------|---|----------------|------|
| 02320 | Sound Ecosystem Assessment (SEA): Printing the Final Report | W. Hauser/ADFG | ADFG |
|-------|---|----------------|------|

Project Tasks to be Completed this Quarter

Jan-Mar

Print and distribute final report.

Post final report on web.

Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|---|---------------------|--------------------|
| 02340 | Toward Long-Term Oceanographic Monitoring of the Gulf of Alaska Ecosystem | T. Weingartner/ UAF | ADFG |

Project Tasks to be Completed this Quarter

Monthly

CTD surveys

Update homepage as data are processed & entered

Prepare windfields and acquire meteorological fields

Nov-Dec

DELAYED TO MARCH-Deploy mooring

Jan

DONE-Attend Annual Workshop (Jan 22-25)

April 15

Submit annual report

Sept

Recover mooring, send instruments for post-calibration, begin data processing

Publications

Budget includes \$1,000 in page charges for 1 ms.

| | | | |
|-----------|---|--------------------------------------|------|
| 02360-BAA | The Exxon Valdez Oil Spill: Guidance for Future Research Activities | C. Elfring/Polar Research Board, NRC | NOAA |
|-----------|---|--------------------------------------|------|

Project Tasks to be Completed this Quarter

Oct-Dec

DONE-5th meeting (report-writing workshop, finalize conclusions & recommendations)

Jan-Mar

-6th meeting (editorial subgroup work on final report)

-Report prepared for NAS outside review process (Jan)

-Outside review occurs (Jan)

-Response to review (Feb)

-Final revisions; NAS approval process (Mar)

April-June

-Deliver prepublication copies of report (April)

-Published volume available (June 30)

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|---|---|--------------------|
| 02395 | Workshop on Nearshore/Intertidal Monitoring | T. Dean/Coastal Resources Associates, C. Schoch/Kachemak Bay NERR | ADFG |

Project Tasks to be Completed this Quarter

Nov

DONE-Convene expert panel

Jan

Present draft plan at workshop (citizen review)

March 31

Complete plan and present to TC

| | | | |
|-------|--------------------------------|--------------------------|------|
| 02396 | Alaska Salmon Shark Assessment | J. Rice, L. Hulbert/NOAA | NOAA |
|-------|--------------------------------|--------------------------|------|

Project Tasks to be Completed this Quarter

UPDATE NOT PROVIDED.

Oct-Dec

Organize & analyze stomach data

Analyze SPOT2 satellite tag data (position only tags)

Dec-July

Attend Annual Workshop (Jan 22-25)

Retrieve, analyze, and synthesize satellite tag data

Analyze salmon shark stomach contents from contributions to the project from other sources

Sept 30

Final report due

| | | | |
|-------|---|--|------|
| 02401 | Assessment of Spot Shrimp Abundance in Prince William Sound | C. Hughey/ Valdez Native Tribe, C. O'Clair/ NOAA | NOAA |
|-------|---|--|------|

Project Tasks to be Completed this Quarter

Oct-Dec

UNDERWAY-Complete comparison of spot shrimp abundance, sex and size composition, fecundity & proportion of ovigerous females between sites and years

Jan-March

-Attend Annual Workshop (Jan 22-25)

-Complete comparison of the abundance data and the data on population structure obtained under the project with historical data collected by ADF&G

April 15

-Submit final report & recommendations to ADF&G for PWS shrimp management plan

Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|--|---------------------|--------------------|
| 02404 | Testing Archival Tag Technology in Coho Salmon | J. Nielsen/USGS-BRD | DOI |

Project Tasks to be Completed this Quarter

Delayed from FY 01:

- Deploy light sensor tag array on stationary buoy in PWS

Dec-Jan

- UNDERWAY FOR 487 COHO-Initiate accelerated growth protocols for 300 coho at Fort Richardson Hatchery.
- UNDERWAY-Implement population monitoring for growth and survival in coho salmon.
- DONE-Attend Annual Workshop (Jan 22-25)

March

- ORDERED 200-Purchase additional archive tags (2nd generation) for coho study.
- Initiate VI tagging in fish at critical size.

April-June

- Second year surgical implants of tags in captivity for estimates of survival, stress, swimming ability and delayed mortality in tagged fish at Fort Richardson Hatchery
- Submit annual report (4/15)
- Surgical implants of archive tags in size-structured coho study groups.
- Release tagged coho with general hatchery release into Ship Creek

July-Sept

- Monitor and evaluate tagged fish recovery, survival, behavior and tag retention from fish recovered in the Ship Creek sport fishing and weir and the Cook Inlet commercial fishery
- Present at AFS meeting (Baltimore, August, \$800)

DRAFT

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|------------------------------------|-------------------|--------------------|
| 02407 | Harlequin Duck Population Dynamics | D. Rosenberg/ADFG | ADFG |

Project Tasks to be Completed this Quarter

Conferences

-Harlequin Duck Working Group (\$1,100; Nov. 2002 Vancouver, BC)

Oct-Dec

UNDERWAY-Coordinate and plan surveys

UNDERWAY-Prepare equipment

UNDERWAY-Contract for vessel support

DONE-Hire personnel

Jan-March

-Conduct population surveys

-Attend Annual Workshop (1/22-25)

April-June

-Data analysis and report preparation

-Maintain equipment

July-Sept

-Submit final report (9/30/02)

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|--|------------------------------|--------------------|
| 02423 | Patterns and Processes of Population Change in Selected Nearshore Vertebrate Predators | J. Bodkin, D. Esler/USGS-BRD | DOI |

Project Tasks to be Completed this Quarter

Conferences

American Ornithologists Union (date & location TBD)-Esler, \$1,000

DONE-Conference on Biology of Marine Mammals, Nov. 2001, Vancouver, BC-Bodkin, \$1,000

Oct-Dec

UNDERWAY-Conduct studies of captive flock of harlequins at ASLC (with birds captured late FY 01)

DONE-Capture harlequins for field studies of survival and CYP1A induction

Jan-March

Obtain/update marine mammal permits

Biopsy livers of captive harlequins for EROD activity; release birds at original capture site

Monitor radioed harlequins for survival study

April-June

Collect beach-cast carcasses of sea otters

Aerial surveys of sea otters

Submit annual report (4/15/02)

July-Sept

| | | | |
|-------|--|--------------------|------|
| 02441 | Harbor Seal Recovery: Effects of Diet on Lipid Metabolism and Health | R. Davis/Texas A&M | ADFG |
|-------|--|--------------------|------|

Project Tasks to be Completed this Quarter

Oct-Dec

UNDERWAY-Analyze remaining blubber samples

Jan-Mar

Statistical analysis and integration of data, including health and body condition results from Castellini

April-June

Submit final report (due 6/30/02)

July-Sept

Submit 5 ms. (page charges \$500):

1. Effects of diet on fatty acid signature in blubber of harbor seals
2. Effects of diet on aerobic capacity and lipid content of harbor seal muscle
3. Spatial distribution of aerobic enzymes for lipid metabolism in muscles of harbor seals
4. Skeletal muscles of harbor seals are composed of oxidative fibers: implications for lipid metabolism
5. Aerobic capacity and lipid droplet density in heart, liver, kidneys, and small intestine of harbor seals

DRAFT

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|----------------------|--------------------|--------------------|
| 02455 | GEM Data System | Restoration Office | ALL |

Project Tasks to be Completed this Quarter

NOTE: FUNDS FOR THIS PROJECT HAVE NOT YET BEEN AUTHORIZED (AND A DPD AND BUDGET NOT YET PREPARED), PENDING HIRING OF A DATA MANAGER BY THE RESTORATION OFFICE.

| | | | |
|-----------|---|-------------------------------------|------|
| 02462-CLO | Effects of Disease on Pacific Herring Population Recovery in Prince William Sound | G. Marty/Univ. of California, Davis | ADFG |
|-----------|---|-------------------------------------|------|

Project Tasks to be Completed this Quarter

FY 01 Tasks Not Completed

DONE-Statistical analysis of spring 2001 samples (Marty)
DONE-Scale analysis of spring 2001 samples (Carpenter)
DONE-Virology and bacteriology of spring 2001 samples (Meyers)

Oct-Dec

DONE (100 FISH)-Collect fall samples (Marty)
DONE-Scale analysis fall samples-age (Moffitt)

Jan-Mar

DONE-Virology & bacteriology fall samples (Meyers)
Attend Annual Workshop, 1/22-25 (Marty)

April-June

Collect spring samples (Marty)

July-Sept

Statistical analysis fall samples (Marty)
Scale analysis spring samples-age (Moffitt)
Virology & bacteriology spring samples (Meyers)

Oct-April

Statistical analysis spring samples (Marty)
Submit final report 4/15/03 (Marty)

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|---|-----------------|--------------------|
| 02476 | Effects of Oiled Incubation Substrate on Pink Salmon Reproduction | R. Heintz/NOAA | NOAA |

Project Tasks to be Completed this Quarter

Oct-Dec

Evaluate F2 survival to eyeing

Jan-March

Begin analysis of results & development of life history model

April-June

Aug-Oct

Final report due (9/15/03)

Conferences

-SETAC (\$1,800)

| | | | |
|-------|---|--|-----|
| 02479 | Effects of Food Stress on Survival and Reproductive Performance of Seabirds | J. Piatt/USGS-BRD, A. Kitaysky/Univ. of Washington | DOI |
|-------|---|--|-----|

Project Tasks to be Completed this Quarter

July-Sept

Synthesis manuscripts due (8/30/02):

-2 ms. on relationships among corticosterone levels, reproductive stage and varying foraging conditions in adult seabirds

(Kitaysky, Piatt, Wingfield)

-2 ms. on relationships among food provisioning, nutritional state and corticosterone secretion in juvenile seabirds (Kitaysky,

Wingfield, Piatt)

-2 ms. on relationship between corticosterone secretion, reproductive performance and post-breeding survival of seabirds

(Kitaysky, Piatt, Shultz)

Submit final report (9/30/02)

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|---|------------------|--------------------|
| 02492 | Were Pink Salmon Embryo Studies in Prince William Sound Biased? | J. Thedinga/NOAA | NOAA |

Project Tasks to be Completed this Quarter

UPDATE NOT PROVIDED.

Incomplete Tasks from FY 01:

Complete 2 ms.

- (1) Detection of pink salmon eggs killed by hydraulic sampling
- (2) Ability of observers to discriminate shock mortality in pink salmon eggs as a function of time after shock

Oct-Dec**Jan-Mar**

Attend Annual Workshop 1/22-25 (Thedinga)

April-June

Submit final report (4/15/02)

| | | | |
|-------|---|----------------|------|
| 02514 | Lower Cook Inlet Waste Management Plan Implementation Phase 1 | T. Turner/ADEC | ADEC |
|-------|---|----------------|------|

Project Tasks to be Completed this Quarter

NOTE: THIS PROJECT WAS APPROVED BY THE TC 12/11/01.

Jan-Mar

Site visit to each community--Seldovia, Nanwalek, Port Graham (Jan. 2002)
 Submit recommendations to Trustee Council that might be addressed in a Phase II (Feb. 28, 2002)

April-June

Complete training and follow-up visits to each community--Seldovia, Nanwalek, Port Graham (Jan-June 2002)

| | | | |
|-------|---|---------------------------------|-----|
| 02535 | EVOS Trustee Council Restoration Program Final Report | J. Hunt/EVOS Restoration Office | ALL |
|-------|---|---------------------------------|-----|

Project Tasks to be Completed this Quarter**Oct-Dec**

PROVIDED DRAFT TEXT OF BOOK TO EDITOR; OTHER TASKS DELAYED TO JAN.-MARCH

- Gather photos, graphics, etc.
- Work with publisher on design & content
- Layout book using PageMaker
- Edit & rewrite as needed
- Provide finished inside pages of book to editor

Sept. 2002

-Book is published

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|--|------------------------------|--------------------|
| 02538 | Evaluation of Two Methods to Discriminate Pacific Herring Stocks along the Northern Gulf of Alaska | T. Otis/ADFG, R. Heintz/NOAA | NOAA & ADFG |

Project Tasks to be Completed this Quarter

Oct-Dec

DONE-Collect fall samples of PWS herring and store them for possible future analysis (analysis depends on results of analysis of 2001 spring samples)

UNDERWAY-Perform fatty acid and elemental analyses of soft tissues and otoliths, respectively, from 2001 spring samples

Jan-Mar

-Analyze results from spring 2001 samples expected Feb. 2002; TC approved funds for analysis of fall 2001 samples contingent on preliminary results of this analysis)

DONE-Attend EVOS Annual Workshop (1/22-25)

April-June

-Submit final report (4/15/02)

July-Sept

| | | | |
|-------|---|---------------|------|
| 02543 | Evaluation of Oil Remaining in the Intertidal from the Exxon Valdez Oil Spill | J. Short/NOAA | NOAA |
|-------|---|---------------|------|

Project Tasks to be Completed this Quarter

Oct-Apr

DONE-Enter FY 01 data into database

UNDERWAY-Analyze FY 01 gravimetric & fingerprinting GS-MS samples

DONE-Attend Annual Workshop (1/22-25)

May-Sept

Produce map depicting sampled locations and present to locals in PWS

Submit final report (9/30/02)

| | | | |
|-------|---|------------------------------|-----|
| 02550 | Alaska Resources Library and Information Services (ARLIS) | All Trustee Council Agencies | ALL |
|-------|---|------------------------------|-----|

Project Tasks to be Completed this Quarter

During the quarter ending 12/31/01, ARLIS staff received 4,522 visitors and 1,085 incoming calls; issued 96 new library cards; responded to 3,366 requests for in-depth information, 194 of which were EVOS questions (routine requests for EVOS documents are handled by the Restoration Office); and processed 3,229 interlibrary loans, including 65 requests for EVOS materials. ARLIS staff reviewed, approved, and distributed 5 final reports, 16 annual reports, and 1 CD ROM set; 370 reports, 2 map sets, 3 CD-ROM sets, and 2 videos are now available. ARLIS staff obtained 5 articles to update the Restoration Office GEM reference files. In September, ARLIS began participation in the Collaborative Digital Reference Service (CDRS), a global electronic reference service of 140 libraries around the world sponsored by the Library of Congress. ARLIS joins the Alaska State Library in providing information about Alaska. In response to a rent increase on current space, ARLIS staff began identifying options for lease space needed until the relocation to UAA in January 2005.

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|--|------------------|--------------------|
| 02552-BAA | Exchange Between Prince William Sound and the Gulf of Alaska | S. Vaughan/PWSSC | NOAA |

Project Tasks to be Completed this Quarter

Oct-Dec

Jan-Mar

DONE-Attend Annual Workshop (1/22-25)

Attend AGU Ocean Sciences Meeting, Honolulu, 2/11-15 (\$2,000)

April-June

Retrieve mooring (May)

July-Sept

FY 03

Submit final report (4/15/03)

| | | | |
|------|---|-----------------|------|
| 2558 | Harbor Seal Recovery: Application of New Technologies for Monitoring Health | S. Atkinson/UAF | ADFG |
|------|---|-----------------|------|

Project Tasks to be Completed this Quarter

FY 01 Tasks Not Completed at End of FY 01

DONE-Analyze FY 01 endocrine samples

UNDERWAY-Analyze FY 01 immunology samples

Conferences

DONE-Biennial Conference of the Biology of Marine Mammals, Vancouver, Canada (\$1,600)

Monthly

ON TRACK-Blood sampling

Oct-Dec

UNDERWAY-Send blood & blubber samples from captive seals for contaminant analysis

DONE-Collect blood samples to assess circadian pattern of T3, T4, & cortisol

Jan-Mar

Undertake endocrine assays with batches of samples to assist with quality control

Attend Annual Workshop, 1/22-25

April-June

Seals collected for rehabilitation arrive at ASLC

Perform circadian sampling

Submit annual report (4/15)

July-Sept

Analyze endocrine & immunology samples

Release rehabilitation seals

Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|--|-------------------|--------------------|
| 02561 | Evaluating the Feasibility of Developing a Community- Based Forage Fish Sampling Project for GEM | D. Roseneau/USFWS | DOI |

Project Tasks to be Completed this Quarter

Oct-Dec

DONE (POSTERS, POSTER HANDOUTS, FISH IDENTIFICATION SHEETS, RELEVANT APEX REPORTS)-Prepare meeting materials & agendas
Contact key individuals
Set up community meetings

Jan-Mar

Community visits
Attend Annual Workshop (1/22-25)

April-June

Community visits

July-Sept

Compile & organize information collected

| | | | |
|----------|--|--|------|
| 2574-BAA | Assessment of Bivalve Recovery on Treated Mixed-Soft Beaches in Prince William Sound | D. Lees/Littoral Eco.& Environ. Services | NOAA |
|----------|--|--|------|

Project Tasks to be Completed this Quarter

NOTE: TC APPROVED FUNDING FOR THIS PROJECT 12/11/01.

Jan-Mar

Contract with subcontractors
Commence sampling site selection process
Attend Annual Workshop (1/22-25)

April-June

Finalize list of candidate sampling sites
Conduct reconnaissance survey to finalize selection of sampling sites (June 9-16)
Field sampling (June 22-30)
Ship bivalve and sediments samples to lab for analysis

July-Sept

Analyze bivalve and sediment samples

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|--|---------------------------------|--------------------|
| 02584 | Evaluation of Airborne Remote Sensing Tools for GEM Monitoring | E. Brown/UAF, J. Churnside/NOAA | ADFG |

Project Tasks to be Completed this Quarter

NOTE: TC APPROVED FUNDING FOR THIS PROJECT 12/11/01.

Conferences

Attend GLOBEC/PICES (Brown, \$1,200 -- POSSIBLY OCT 2002, WHICH IS ACTUALLY IN FY 03...)

Jan-Mar

DONE-Attend Annual Workshop (1/22-25)
Develop survey design and flight plan

Apr-June

Complete instrumentation preparation and calibration

July-Sept

Complete field data collection
Initiate validation data collation
Complete signal processing

April 15, 2003

Submit final report

| | | | |
|-------|--|---|------------|
| 02585 | Lingering Oil: Bioavailability and Effects to Prey and Predators | J. Rice, J. Short/NOAA; J. Bodkin, B. Ballachey/USGS; D. Esler/Simon Fraser Univ. | NOAA & DOI |
|-------|--|---|------------|

Project Tasks to be Completed this Quarter

NOTE: TC APPROVED FUNDING FOR THIS PROJECT 12/11/01.

Jan-Mar

Plan sea otter capture
Obtain/update marine mammal permits
Biopsy livers of captive harlequins at ASLC for histopathology
NOAA deployment (Feb.)
NOAA pick-up cruise (Mar.)
Attend Annual Workshop (1/22-25)

Apr-June

NOAA deployment (June)

July-Sept

NOAA pick-up cruise (July)
Capture sea otters in WPWS; sample blood & liver (July)

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|---|---|--------------------|
| 02593 | River Otters and Fishes in the Nearshore Environment: A Synthesis | S. Jewett/UAF, M. Ben-David/U.Wyo., G. Blundell/UAF | ADFG |

Project Tasks to be Completed this Quarter

Oct-Dec

UNDERWAY-Complete spatial analyses of spatial & temporal data of fishes & otters

Jan-Mar

DONE-Attend Annual Workshop (1/22-25)

Sept

Submit manuscript to Ecology: Blundell, Brown, Kern, Ben-David, & Jewett. Forage fishes & river otter sociality: variation in spatial & temporal distributions.

| | | | |
|-------|--|--------------------------------------|------|
| 02600 | Synthesis of the Ecological Findings from the EVOS Damage Assessment and Restoration Programs, 1989-2001 | R. Spies/EVOS Chief Scientist, et al | ADNR |
|-------|--|--------------------------------------|------|

Project Tasks to be Completed this Quarter

NOTE: TC APPROVED FUNDING FOR THIS PROJECT 12/11/01.

Mar-May

-Synthesis team meets to identify approach.

July-Sept

- Preliminary chapter outlines completed
- List of references assembled
- Book outline finalized

| | | | |
|-------|--|-------------|------|
| 02603 | Implementation of an Ocean Circulation Model: A Transition from SEA to GEM | J. Wang/UAF | ADFG |
|-------|--|-------------|------|

Project Tasks to be Completed this Quarter

NOTE: TC APPROVED FUNDING FOR THIS PROJECT 12/11/01.

Conferences

Ocean Science meeting, Hawaii Feb. 9-16 (\$1,700)

Jan-Mar

Complete tide simulation & preparation of NCEP climatological forcing
DONE-Attend Annual Workshop (1/22-25)
Start to implement the forcing data to the 3D-GOA model

July-Sept

Complete modeling of the seasonal cycle
Post simulation on web (9/15/02)

Dec 15, 2002 -- Final report due

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|--|-----------------|--------------------|
| 02608 | Permanent Archiving of Specimens Collected in Nearshore Habitats | N. Foster/UAF | ADFG |

Project Tasks to be Completed this Quarter

Oct-Dec

DONE-Assign accession numbers and create accession log

Jan-Mar

DONE-Attend Annual Workshop (1/22-25)

Prepare specimen labels

Apr-June

Unpack specimens and sort by taxon

July-Sept

Label specimens and incorporate into Museum shelving

Provide all species locality data to Arctic Observatory database

Submit ms. on distribution of marine mollusks and polychaetes

Submit final report

| | | | |
|------|-------------------------------------|--|------|
| 2610 | Kodiak Archipelago Youth Area Watch | T. Schneider/Kodiak Island Borough School District | ADFG |
|------|-------------------------------------|--|------|

Project Tasks to be Completed this Quarter

Sept-Dec

DONE-Students selected

DONE EXCEPT FOR AHKIOK (WEATHER DELAYS)-Site teacher, tribal, and researcher orientation

DONE EXCEPT FOR AHKIOK (WEATHER DELAYS)-Student orientation and training

DONE-Projects submitted to regional science fair

Jan-March

Attend Annual Workshop (Schneider, 1/22-25)

April-June

Regional workshop

Summer plans for continued work by students submitted to PI

Annual report due (4/15)

July-Sept

Participate in Science Camp

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|--|-----------------|--------------------|
| 02612 | Detecting and Understanding Marine-Terrestrial Linkages in the Kenai River Watershed | W. Hauser/ADFG | ADFG |

Project Tasks to be Completed this Quarter

Oct-Dec

DONE-Form agency & technical science teams
DONE-Initiate planning meetings

Jan-Mar

DONE-Workshop (1/25)
Distribute draft plan for public comment & review (Feb)

Apr-June

Submit final plan (April)

July-Sept

Investigate funding sources

| | | | |
|-------|---|----------------|------|
| 02614 | Monitoring Program for Near-Surface Temperature, Salinity, and Fluorescence in the Northern Pacific Ocean | S. Okkonen/UAF | ADFG |
|-------|---|----------------|------|

Project Tasks to be Completed this Quarter

Oct-Dec

DONE (DELIVERY DATE 2/15/02)-Order instrumentation & ancillary hardware
WILL BE DONE IN SPRING-Install TSG & fluorometer on tanker

Jan-Sept

DONE-Attend Annual Workshop (1/22-25)
Data acquisition

| | | | |
|-------|--|-----------------|------|
| 02622 | Digital Maps from Existing Seasonal Environmental Sensitive Area Maps: Cook Inlet/ Kenai Peninsula | J. Whitney/NOAA | NOAA |
|-------|--|-----------------|------|

Project Tasks to be Completed this Quarter

NOTE: TC APPROVED FUNDING FOR THIS PROJECT 12/11/01.

Jan-Mar

Review content of 1994 summary ESI maps of Cook Inlet/Kenai Peninsula and provide any new or updated data to NOAA
Finalize digital files of Cook Inlet/Kenai Peninsula summary ESI maps
Attend Annual Workshop (1/22-25)

Apr-June

Finalize updated digital files into the 4 standardized digital map products
Prepare and review CDs of the above

July-Sept

Distribute final CD (100 cc) of the updated digital data for the summary maps (7/31/02)
Post the maps on web

Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|--|---------------------------------|--------------------|
| 02624-BAA | A CPR-Based Plankton Survey Using Ships of Opportunity to Monitor the Gulf of Alaska | S. Batten/SAHFOS, D. Welch/DFOC | NOAA |

Project Tasks to be Completed this Quarter

NOTE: TC APPROVED FUNDING FOR THIS PROJECT 12/11/01.

Conferences

Attend PICES XI, China (Oct. 2002) (\$3,200)

Jan-Mar

DONE (BATTEN)-Attend Annual Workshop (1/22-25)

Ship equipment to vessel in Long Beach

1st sampling from AK to CA (late March)

Apr-June

2nd sampling from AK to CA (late April)

Ship equipment to vessel in Vancouver

3rd sampling from AK to CA (early June)

Sampling from Vancouver to Kamchatka

July-Sept

4th sampling from AK to CA (mid-July)

5th sampling from AK to CA (mid-Aug)

Integrate biological data with physical data acquired by Okkonen & Royer

Preliminary taxonomic processing complete

April 15, 2003

Submit final report

DRAFT

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|----------------------|--------------------|--------------------|
| 02630 | Planning for GEM | Restoration Office | ALL |

Project Tasks to be Completed this Quarter

Oct-Dec

DONE-Participate in PICES MONITOR task team meeting
DONE-Attend NPMR presentations on project results
DONE-Meet with NRC to hear oral comments on draft GEM Program Document
DONE-Hold physical oceanographic modeling workshop
DONE-Participate in Watershed Workshop Planning Meeting
DONE-Participate in US GOOS Steering Committee meeting
DONE-Complete GEM brochure
UNDERWAY-Update web site

Jan-Mar

DONE-Annual Workshop (1/22-25)
Issue FY 03 Invitation, Phase I
Participate in AGU meeting session on cross-shelf transport

April-June

Receive comments from NRC on GEM Program Document (Apr)
STAC process in place
First STAC meeting (May)
Subcommittee process in place
Submit revised GEM Program Document for TC approval (June)
Oceans & Watersheds Symposium (6/18-19)

July-Sept

| | | | |
|-----------|---|------------------------------|------|
| 02636-BAA | Management Applications: Commercial Fishing | K. Adams, R. Mullins/Cordova | NOAA |
|-----------|---|------------------------------|------|

Project Tasks to be Completed this Quarter

NOTE: TC APPROVED FUNDS FOR THIS PROJECT 12/11/01 CONTINGENT ON A REVISED DPD; REVISED DPD HAS NOT YET BEEN APPROVED.

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|---|-----------------|--------------------|
| 02649 | Reconstructing Sockeye Populations in the Gulf of Alaska over the Last Several Thousand Years | B. Finney/UAF | ADFG |

Project Tasks to be Completed this Quarter

Conferences

DID NOT ATTEND DUE TO SCHEDULING CONFLICT; WILL ATTEND OTHER APPROPRIATE CONFERENCE AT LATER DATE-AGU, San Francisco (\$1,400)

Oct-Dec

UNDERWAY-Complete del15N analyses on Eshamy Lake and Solf Lake (control) cores
UNDERWAY-Submit Eshamy and Solf samples for 14C and 210Pb dating

Jan-Mar

DONE-Attend Annual Workshop (1/22-25)
Core Upper Russian Lake

Apr-June

Complete del15N analyses on cores from Upper Russian Lake
Submit Upper Russian Lake samples for 14C and 210Pb dating
Core Delight and Desire lakes

July-Sept

Complete literature reviews of proxy data describing climate/oceanographic changes in northern GOA over last several millennia
Develop hypotheses relating changes in salmon populations to climatic changes
Submit ms. concerning applications of retrospective records of sockeye populations in fisheries management

| | | | |
|-------|--|-------------------------------|-----|
| 02656 | Retrospective Analysis of Nearshore Marine Communities Based on Analysis of Archaeological Material and Isotopes | G. Irvine/USGS, J. Schaaf/NPS | DOI |
|-------|--|-------------------------------|-----|

Project Tasks to be Completed this Quarter

Oct-Dec

Jan-Mar

Complete evaluation of climate record, midden materials for selection of target dates and shells for analysis
DONE-Attend Annual Workshop (1/22-25)

April-July

Complete evaluation of isotopic techniques, preliminary assessments of recent material
Test archaeological material

Aug-Sept

Complete isotopic analysis of recent (test) bivalves and archaeological midden shells
Radiocarbon (14c) analysis of selected clam shells
Complete ecological analysis of composition/size structure of selected midden species
Present results to Ecological Society of America, Tucson (\$2,800)

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|---|-----------------------------|--------------------|
| 02667 | Effectiveness of Citizens' Environmental Monitoring Program | S. Mauger/Cook Inlet Keeper | ADEC |

Project Tasks to be Completed this Quarter

Oct-Dec 2001

- Begin analysis of CEMP data to determine effectiveness of protocols

Jan-Mar 2002

- Attend EVOS Annual Restoration Workshop (Jan. 22-25)
- Continue analysis of CEMP data

April-June 2002

- Continue analysis of CEMP data

July-Sept 2002

- Complete analysis of CEMP data (July 31)
- Produce & release final report, which will include recommendations for improvements to CEMP protocols (Sept. 30)

Oct-Dec 2002

- Convene meeting with current & potential monitoring partners & agencies to communicate findings from analysis

Jan-April 2003

- Incorporate suggestions into the CEMP Quality Assurance Project Plan
- Submit final report to EVOS (April 15)

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|--|-----------------------------|--------------------|
| 02668 | Developing an Interactive Water Quality and Habitat Database and Making it Accessible on the Web | J. Cooper/Cook Inlet Keeper | ADEC |

Project Tasks to be Completed this Quarter

NOTE: TC APPROVED FUNDING FOR THIS PROJECT 12/11/01.

Jan-Mar

Contract with database and web specialist

Determine best data system that allows for all parameters and methods and meets committee's database priorities

Identify and create GIS maps and graphs to link with database

Create interface between database, GIS and internet

Attend Annual Workshop (1/22-25)

Establish securities for database access on the web

Formalize Standard Operative Procedures for quality oversight of database use and data management

Apr-June

Uplink database on the web and conduct press and other outreach to announce its availability

Oversee use of the database by monitoring partner groups as a way to enter and manage their habitat and water quality data

July-Sept

Evaluate product

Update web page

April 15, 2003

Submit final report

DRAFT

**Exxon Valdez Oil Spill Project Status Summary
FY 02 Work Plan
Quarter Ending December 31, 2001**

| <u>Proj.No.</u> | <u>Project Title</u> | <u>Proposer</u> | <u>Lead Agency</u> |
|-----------------|--|---------------------------------------|--------------------|
| 02671 | Coordinating Volunteer Vessels of Opportunity to Collect Oceanographic Data in Kachemak Bay and Lower Cook Inlet | D. Stram, C. Schoch/Kachemak Bay NERR | ADFG |

Project Tasks to be Completed this Quarter

Oct-Dec

UNDERWAY-Order equipment for KBRR boat (thermo-salinograph)
DONE-Construct and deploy Fall drift cards (KBRR)
UNDERWAY-Develop outreach plan (CIK)
UNDERWAY-Set up database (CIK)

Jan-Mar

Attend Annual Workshop (1/22-25)
Install thermosalinograph on KBRR vessel
Construct Spring drift cards (KBRR)
KBRR personnel participate in workshop on oceanographic monitoring

Apr-June

Preliminary spring transects completed (KBRR, CIK)
Summer data collection transects
Deploy Spring drift cards (KBRR, CIK)

July-Sept

Analyze collected transect data (KBRR)
Complete volunteer vessel database
Complete drift card study
Establish protocol for data collection and processing (KBRR, CIK)
Submit final report

Exxon Valdez Oil Spill Trustee Council

441 W. 5th Ave., Suite 500 • Anchorage, Alaska 99501-2340 • 907/278-8012 • fax 907/276-7178



MEMORANDUM

TO: Trustee Council

FROM: Molly McCammon
Executive Director

DATE: February 19, 2002

SUBJ: Asset Allocation Recommendation

On February 15, 2002 the Investment Working Group met to review the Investment Fund reports for December 2001 and January 2002, the EVOS Investment Fund's portfolio performance compared to passively-managed benchmarks, Callan's 2002 Capital Market Assumptions, and the Trustee Council's asset allocation policy.

In summary, the Investment Fund had recouped almost all this past year's losses – until January 2002. At the end of January, we were down about \$2.5 million from the fund's starting point. However, the Investment Fund is still doing equal to or better than our benchmark funds, which is a positive.

John Jenks with the Alaska Department of Revenue will brief the Trustee Council on the Callan Associates 2002 Capital Market Assumptions (attached). The Investment Working Group reviewed those assumptions and discussed at length the value of continuing to invest in international equities and keeping with our basic asset allocation.

The Callan report projects returns for the next five years. Their projections indicate that domestic equities will do slightly better in 2002 than in 2001, with a slightly higher projected risk (page 30). The projected risk for bonds is down in 2002 from 2001, but the return is also down as a result of lower interest rates. The projected risk for the international asset class in 2002 remains the same as in 2001, with a slightly higher rate of return. Projected inflation is down for 2002 compared to 2001 (2.90% and 3.25%, respectively).

The Trustee council's current asset allocation is 41% domestic equities, 17% international equities and 42% bonds within established bands.

The following table summarizes the projected risk, rate of return and inflation for this allocation for years 2000 – 2002, which is targeting a 5% real rate of return:

Federal Trustees
U.S. Department of the Interior
U.S. Department of Agriculture
National Oceanic and Atmospheric Administration

State Trustees
Alaska Department of Fish and Game
Alaska Department of Environmental Conservation
Alaska Department of Law

| Year | Risk | Rate of Return | Inflation |
|------|---------|----------------|-----------|
| 2000 | 10.59% | 8.25% | 3.25% |
| 2001 | 10.478% | 8.147% | 3.25% |
| 2002 | 10.879% | 7.911% | 2.9% |

Following a review of the report and current returns and a lengthy discussion of the Trustee Council's long-term goals for the fund, the Investment Working Group recommended continuing with the current asset allocation, and rebalancing the fund when appropriate. This recommendation was based on an acknowledgement that the Trustee Council's goals for the fund have not changed; that our investment horizon is the long-term; that history shows a recession is almost always followed by strong rebound; and that other state funds have also discussed the current economic situation and decided to hold tight (e.g., Alaska Permanent Fund and Alaska State Pension Investment Board). John Jenks and Bob Storer will be available to answer questions about this recommendation.

The recommendation was not totally unanimous. Consultant Peter Bushre recommended an asset mix with a higher percentage of bonds because he believes the economic downturn is not over and the Trustee Council's investment strategy should be more conservative. Peter will also be available by teleconference during the meeting if you would like to question him directly.

Based on the Investment Working Group's discussion and recommendation, I am recommending that the Trustee Council continue with its current asset allocation policy.

Exxon Valdez Oil Spill Trustee Council

**January 2002
Investment Report**

Exxon Valdez Oil Spill Trustee Council

441 W. 5th Ave., Suite 500 • Anchorage, Alaska 99501-2340 • 907/278-8012 • fax 907/276-7178



MEMORANDUM

TO: Trustee Council

THROUGH: Molly McCammon
Executive Director

FROM: 
Debbie Hennigh
Special Assistant

DATE: February 14, 2002

RE: January Investment Reports

Included is the Department of Revenue's Performance Measurement report as of January 31, 2002 (all reports are not available until 10th working day of the month).

Also attached are the following graphs for activity ending January 31, 2002:

- Investment Fund Assets, and
- Earnings (Loss).

Also included are graphs of each investment pool's activity for October 2000 through January 2002, the entire investment fund/benchmark, and each individual pool/benchmark for November 2001.

Attachments

Cc: Investment Working Group

Federal Trustees

U.S. Department of the Interior
U.S. Department of Agriculture
National Oceanic and Atmospheric Administration

State Trustees

Alaska Department of Fish and Game
Alaska Department of Environmental Conservation
Alaska Department of Law

STATE OF ALASKA
DEPARTMENT OF REVENUE
TREASURY DIVISION

Exxon Valdez Oil Spill Investment Fund

STATEMENT OF INVESTED ASSETS

January 31, 2002 and 2001

| Investments (at fair value) | <u>2002</u> | <u>2001</u> |
|--|-----------------------|-----------------------|
| Cash and cash equivalents | | |
| Short-term Fixed Income Pool | \$ 256,630 | \$ 93,406 |
| Marketable debt and equity securities | | |
| Broad Market Fixed Income Pool | 72,587,020 | 60,291,225 |
| Non-retirement Domestic Equity Pool | 79,742,542 | 54,289,747 |
| SOA International Equity Pool | <u>29,825,727</u> | <u>23,374,808</u> |
| Total invested assets | <u>\$ 182,411,919</u> | <u>\$ 138,049,185</u> |

STATE OF ALASKA
DEPARTMENT OF REVENUE
TREASURY DIVISION

Exxon Valdez Oil Spill Investment Fund

STATEMENT OF INVESTMENT INCOME
AND CHANGES IN INVESTED ASSETS

For the period ended January 31, 2002

| | <u>CURRENT MONTH</u> | <u>FEDERAL YEAR TO DATE</u> |
|---|--------------------------|-------------------------------------|
| Investment Income | | |
| Cash and cash equivalents | | |
| Short-term Fixed Income Pool | \$ 451 | \$ 2,203 |
| Marketable debt and equity securities | | |
| Non-pooled investments | | |
| Broad Market Fixed Income Pool | 478,834 | 524,393 |
| Non-retirement Domestic Equity Pool | (1,013,099) | 7,451,960 |
| SOA International Equity Pool | (1,431,107) | (26,348) |
| Commission Recapture | 580 | 8,013 |
| Total income from marketable debt and equity securities | <u>(1,964,793)</u> | <u>7,958,019</u> |
| Total investment income (loss) | (1,964,342) | 7,960,221 |
| Total invested assets, beginning of period | 184,376,261 | 174,451,698 |
| Net contributions (withdrawals) | <u>0</u> | <u>0</u> |
| Total invested assets, end of period | \$ <u>182,411,919</u> | \$ <u>182,411,919</u> |

**STATE OF ALASKA
DEPARTMENT OF REVENUE - TREASURY DIVISION**

**Exxon Valdez Oil Spill Investment Fund
Asset Allocation Policy (effective 4/24/00) with Actual Investment Holdings as of
January 31, 2002**

| | <u>Asset Allocation</u> | | <u>Fair value</u> | <u>Current Allocation</u> | <u>Variance</u> |
|--|-------------------------|--------------|------------------------|---------------------------|------------------|
| | <u>Policy</u> | <u>Range</u> | | | |
| Cash and cash equivalents | | | | | |
| Short-term Fixed Income Pool | <u>0.00%</u> | | <u>256,180</u> | 0.14% | -0.14% |
| Total cash and cash equivalents | <u>0.00%</u> | | <u>256,180</u> | <u>0.14%</u> | <u>-0.14%</u> |
| Marketable debt and equity securities | | | | | |
| Broad Market Fixed Income Pool | <u>42.00%</u> | 35% - 49% | <u>72,587,020</u> | 39.79% | 2.21% |
| Non-retirement Domestic Equity Pool | <u>41.00%</u> | 34% - 48% | <u>79,742,542</u> | 43.72% | -2.72% |
| SOA International Equity Pool | <u>17.00%</u> | 12% - 22% | <u>29,825,727</u> | 16.35% | 0.65% |
| Total marketable debt securities | <u>100.00%</u> | | <u>182,155,289</u> | <u>99.86%</u> | <u>0.14%</u> |
| Total holdings | <u>100.00%</u> | | <u>182,411,469</u> | <u>100.00%</u> | <u>0.00%</u> |
| Short-term Fixed Income Pool Interest Receivable | | | <u>451</u> | | |
| Total Invested Assets at Fair Value | | | <u>182,411,919</u> | | |

Exxon Valdez Oil Spill Investment Fund

Period Ending January 31, 2002

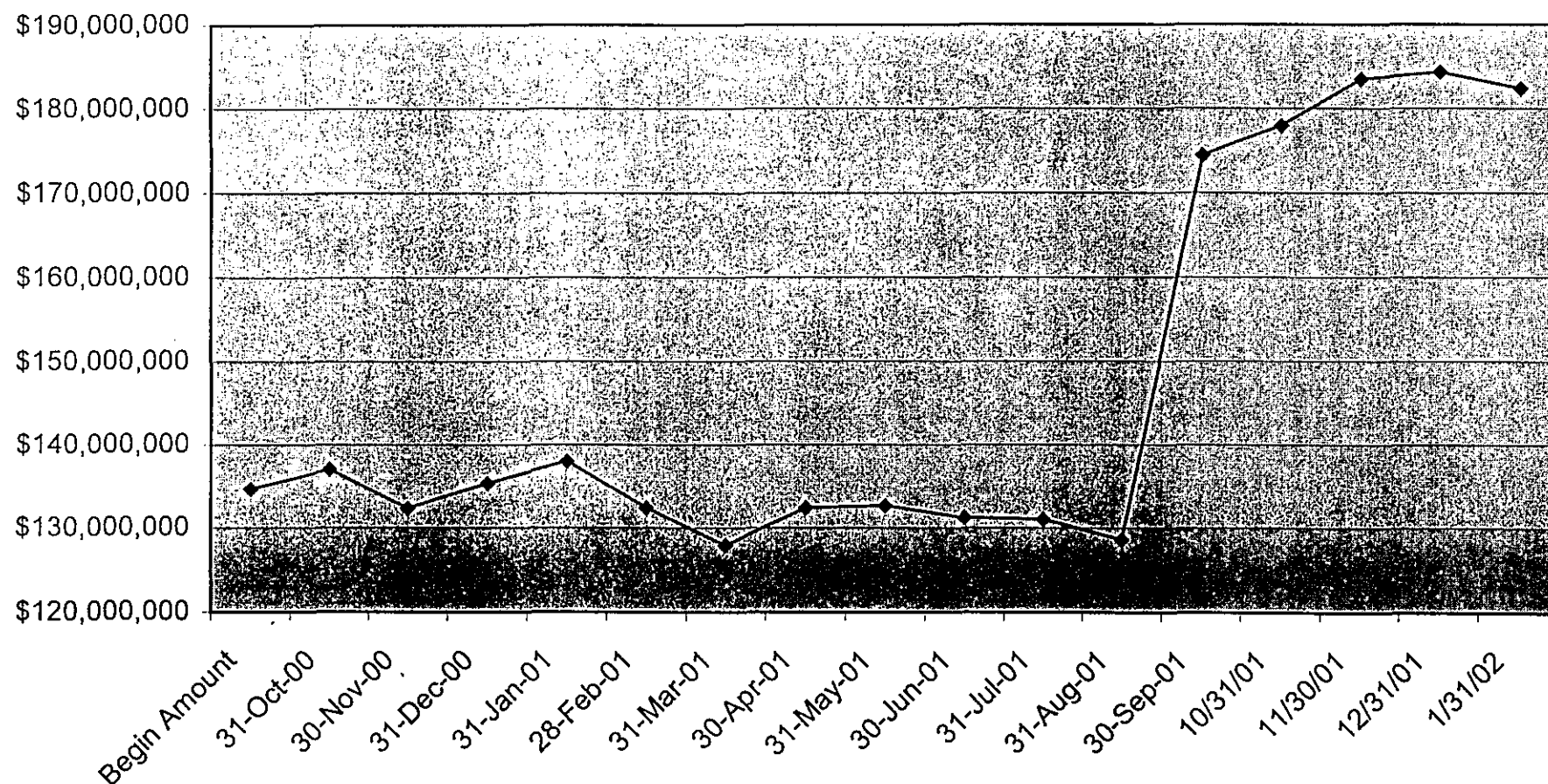
| | <u>Mkt Value (\$M)</u> | <u>Monthly Return</u> | <u>3 Mo. Return</u> | <u>Calendar YTD</u> | <u>Federal Fiscal YTD*</u> | <u>Inception to Date**</u> |
|-------------------------------------|------------------------|---------------------------|-------------------------|-------------------------|--------------------------------|--------------------------------|
| AY02 EVOS Investment Fund | 182,412 | -1.07 | 2.51 | -1.07 | 4.56 | -3.45 |
| EVOS Investment Fund Index | | -1.08 | 2.51 | -1.08 | 4.84 | -6.14 |
| Short-term Fixed Income Pool | 256 | 0.17 | 0.59 | 0.17 | 0.86 | 5.02 |
| 91 day T-Bill | | 0.15 | 0.52 | 0.15 | 0.78 | 4.55 |
| Broad Market Fixed Income Pool | 72,587 | 0.66 | -1.20 | 0.66 | 0.72 | 10.35 |
| Lehman Brothers Aggregate Index | | 0.81 | -1.22 | 0.81 | 0.85 | 10.40 |
| Non-Retirement Domestic Equity Pool | 79,743 | -1.25 | 7.82 | -1.25 | 10.31 | -14.22 |
| Russell 3000 Index | | -1.25 | 7.85 | -1.25 | 10.36 | -15.76 |
| SOA International Equity Pool | 29,826 | -4.58 | -1.49 | -4.58 | -0.06 | -19.58 |
| Morgan Stanley Capital Intl. (EAFE) | | -5.31 | -1.24 | -5.31 | 1.29 | -21.29 |

Source: State Street Bank, In-Sight.

* Federal Fiscal YTD indicates a term beginning October 1, 2001 to current period ending.

** Inception Date: October 31, 2000

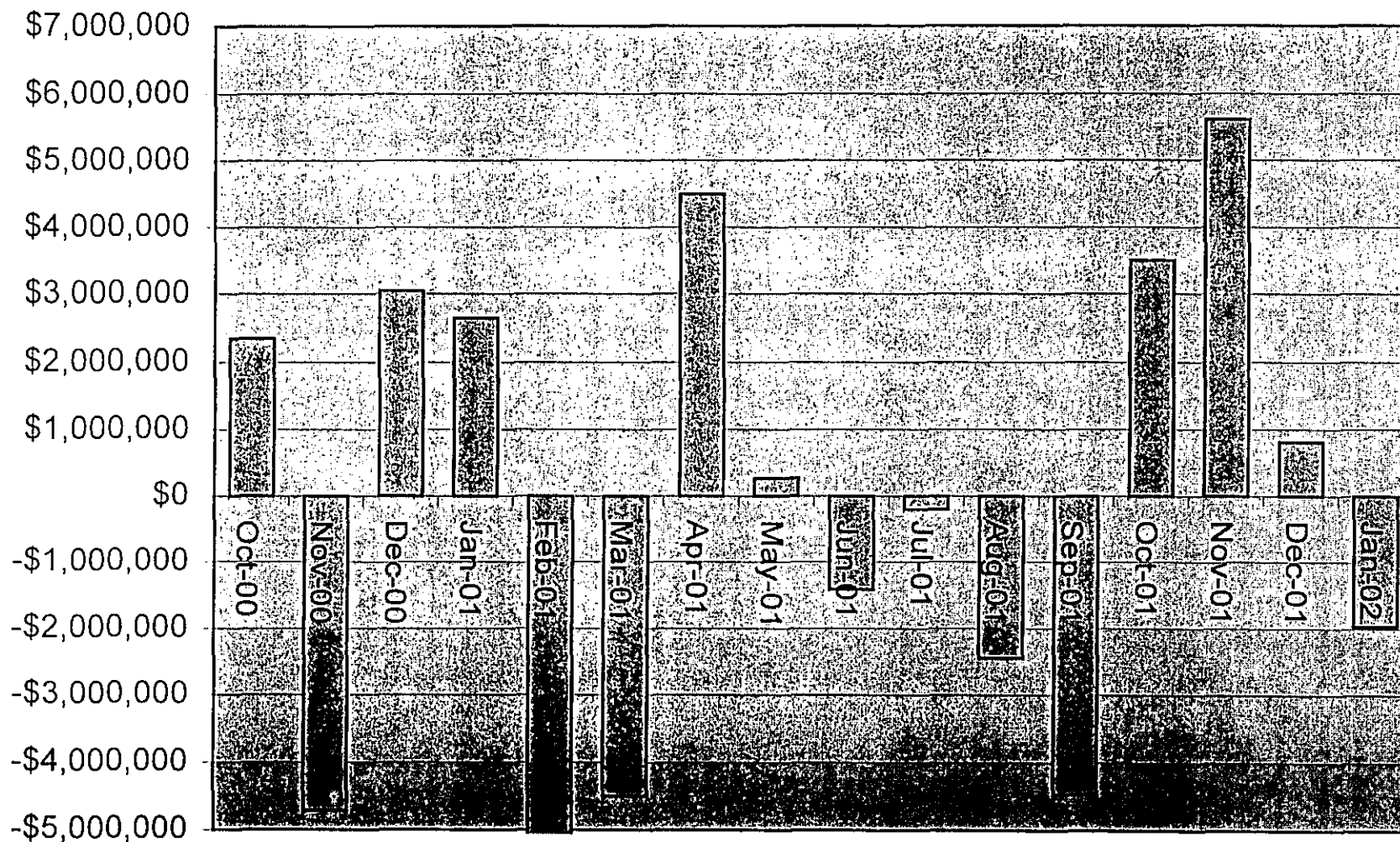
Exxon Valdez Oil Spill Trustee Council Investment Fund Assets



Note: September's amount reflects addition of Exxon's last payment of \$66,113,500

Exxon Valdez Oil Spill Trustee Council

Investment Fund Earnings (Loss) as of January 31, 2002



EVOS Investment Fund Earnings (Losses)

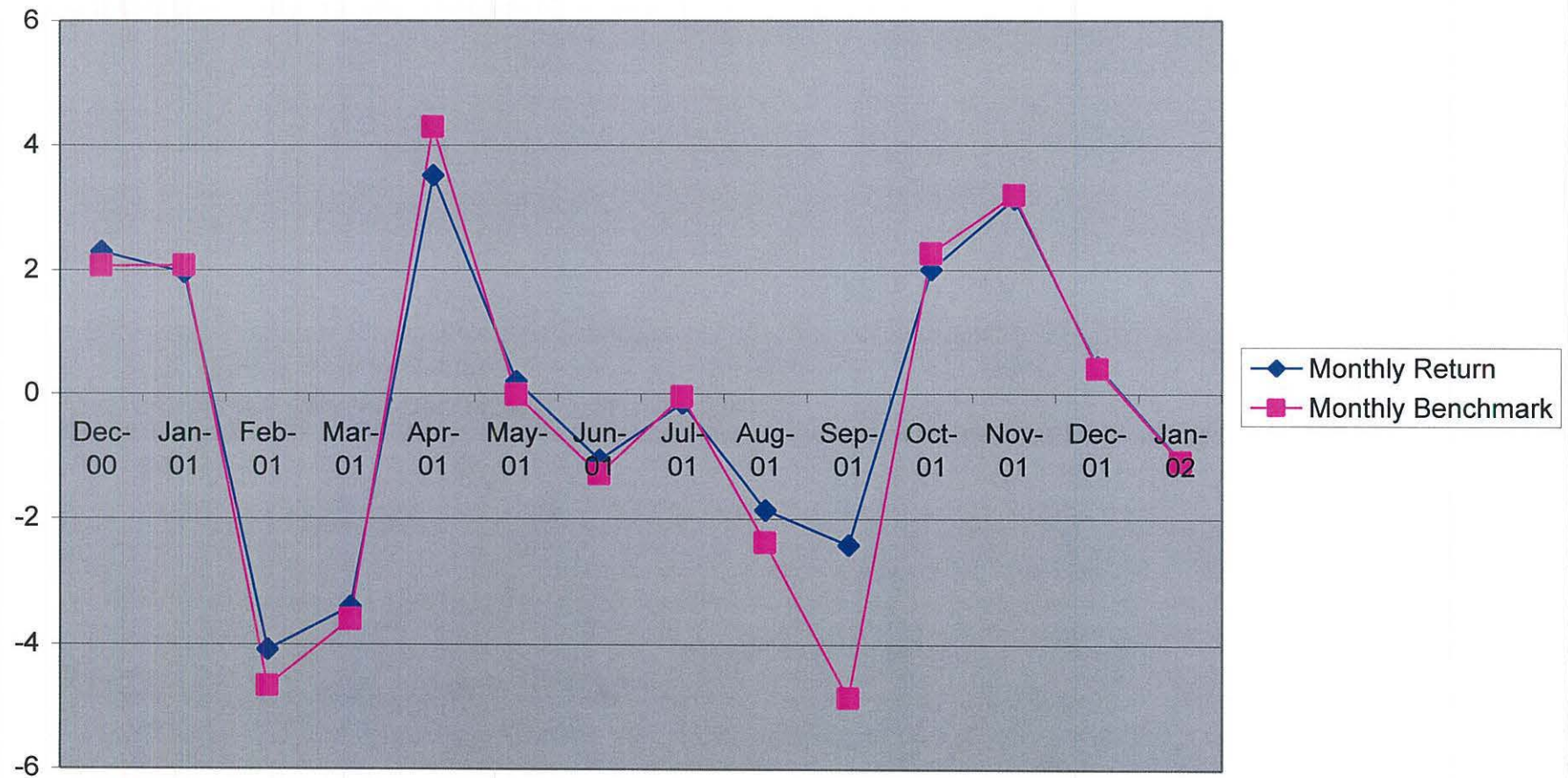
| | SFY 01 | SFY 02 | Total | |
|------------------------------|---------------------|------------------|---------------------|-------------|
| 31-Oct-00 | \$2,503,034 | | | |
| 30-Nov-00 | -\$4,794,990 | | | |
| 31-Dec-00 | \$3,042,417 | | | |
| 31-Jan-01 | \$2,652,034 | | | |
| 28-Feb-01 | -\$5,626,092 | | | |
| 31-Mar-01 | -\$4,499,192 | | | |
| 30-Apr-01 | \$4,497,983 | | | |
| 31-May-01 | \$267,233 | | | |
| 30-Jun-01 | -\$1,412,478 | | | |
| 31-Jul-01 | | -\$203,007 | | |
| 31-Aug-01 | | -\$2,442,542 | | |
| 30-Sep-01 | | -\$4,465,637 | | |
| 31-Oct-01 | | \$3,499,297 | | |
| 30-Nov-01 | | \$5,613,492 | | |
| 31-Dec-01 | | \$811,775 | | |
| 31-Jan-02 | | -\$1,964,261 | | approximate |
| Total Earnings/Losses | -\$3,370,051 | \$849,117 | -\$2,520,934 | |

EVOS Investment Fund - EVOS Index

NOTE: The increase in assets from August 2001 to September 2001 is due to Exxon's last payment and not earnings.

| | Dec-00 | Jan-01 | Feb-01 | Mar-01 | Apr-01 | May-01 | Jun-01 | Jul-01 | Aug-01 | Sep-01 | Oct-01 | Nov-01 | Dec-01 | Jan-02 |
|--------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Monthly Return | 2.3 | 1.96 | -4.08 | -3.4 | 3.52 | 0.2 | -1.06 | -0.15 | -1.86 | -2.41 | 2.01 | 3.15 | 0.44 | -1.07 |
| Monthly Benchmark | 2.07 | 2.08 | -4.66 | -3.6 | 4.29 | -0.02 | -1.29 | -0.04 | -2.37 | -4.85 | 2.27 | 3.21 | 0.41 | -1.08 |
| Market Value (\$M) | \$135,397 | \$138,049 | \$132,423 | \$127,924 | \$132,404 | \$132,671 | \$131,259 | \$131,056 | \$128,613 | \$174,452 | \$177,950 | \$183,565 | \$184,376 | \$182,412 |

EVOS INVESTMENT FUND - EVOS INDEX



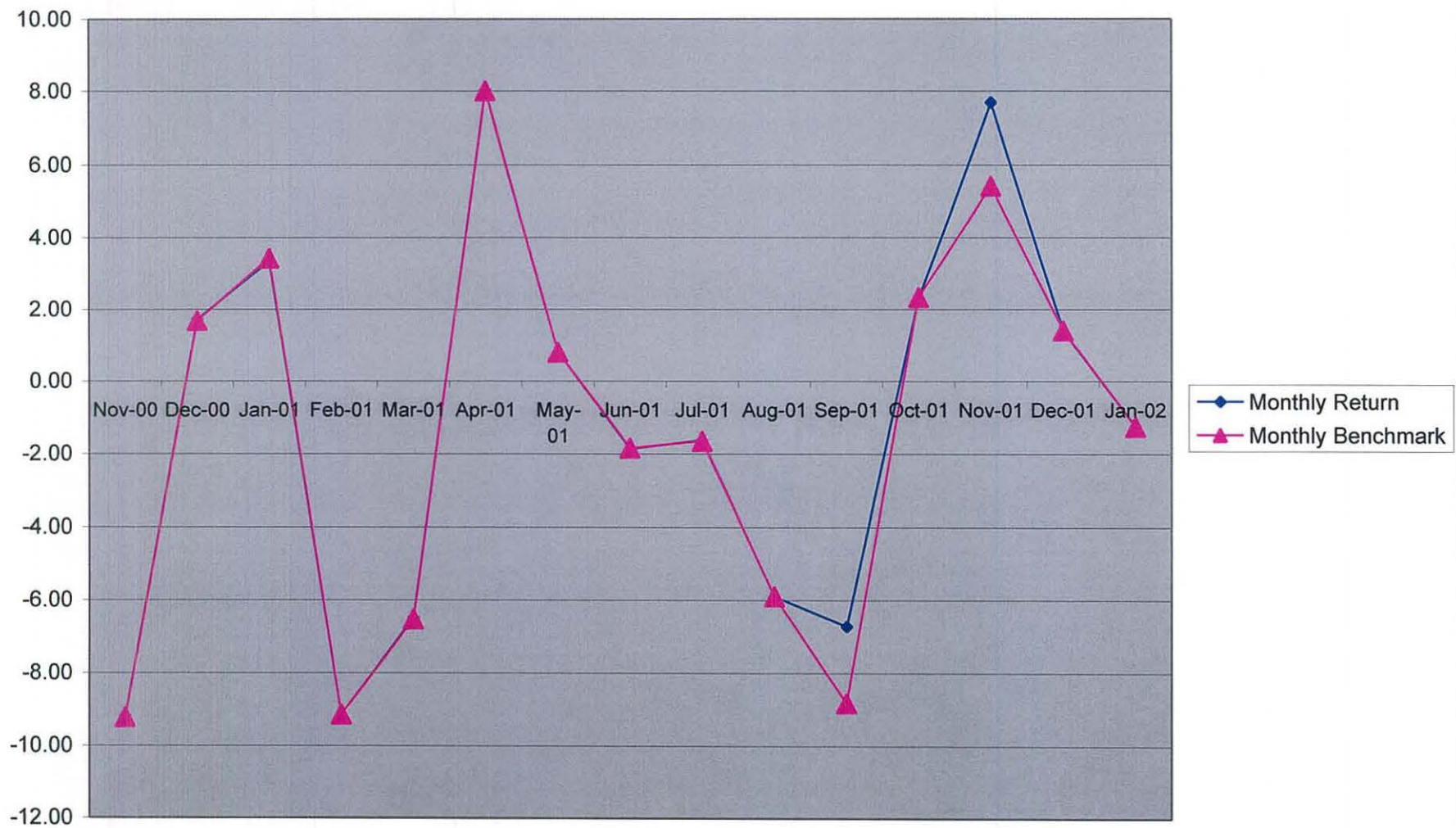
Domestic Equities Pool - Russell 3000 Index

NOTE: The increase in assets from August 2001 to September 2001 is due to Exxon's last payment and not earnings.

| | Nov-00 | Dec-00 | Jan-01 | Feb-01 | Mar-01 | Apr-01 | May-01 | Jun-01 | Jul-01 | Aug-01 | Sep-01 | Oct-01 | Nov-01 | Dec-01 | Jan-02 |
|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Monthly Return | -9.20 | 1.72 | 3.34 | -9.14 | -6.49 | 8.03 | 0.80 | -1.86 | -1.63 | -5.9 | -6.72 | 2.31 | 7.69 | 1.39 | -1.25 |
| Monthly Benchmark | -9.22 | 1.68 | 3.42 | -9.14 | -6.52 | 8.02 | 0.80 | -1.84 | -1.65 | -5.89 | -8.82 | 2.33 | 5.42 | 1.41 | -1.25 |
| Market Value (\$M) | 51,649 | 52,537 | 54,290 | 49,329 | 46,126 | 49,828 | 50,228 | 49,294 | 48,492 | 45,636 | 72,291 | 73,960 | 79,649 | 80,756 | 79,743 |

Domestic Equities Pool - Russell 3000 Index

January 2002



Fixed Income Pool - Lehman Brothers Aggregate Index

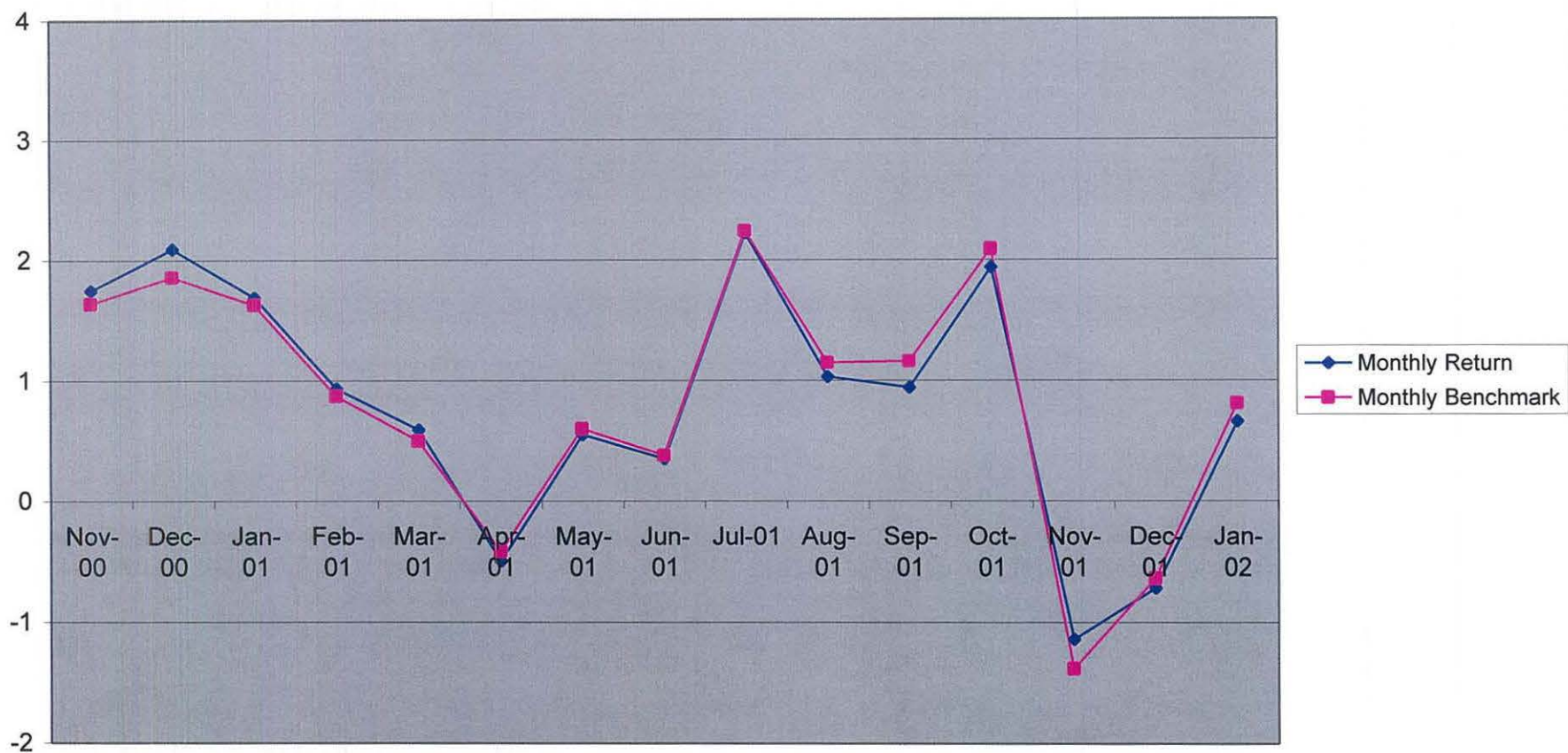
NOTE: The increase in assets from August 2001 to September 2001 is due to Exxon's last payment and not earnings.

| | Nov-00 | Dec-00 | Jan-01 | Feb-01 | Mar-01 | Apr-01 | May-01 | Jun-01 | Jul-01 | Aug-01 | Sep-01 | Oct-01 | Nov-01 | Dec-01 | Jan-02 |
|-----------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Monthly Return | 1.75 | 2.09 | 1.69 | 0.93 | 0.59 | -0.5 | 0.55 | 0.35 | 2.22 | 1.03 | 0.94 | 1.94 | -1.14 | -0.72 | 0.66 |
| Monthly Benchmark | 1.64 | 1.86 | 1.63 | 0.87 | 0.5 | -0.42 | 0.6 | 0.38 | 2.24 | 1.15 | 1.16 | 2.09 | -1.38 | -0.64 | 0.81 |
| Market Value (in \$M) | 58,073 | 59,289 | 60,291 | 60,853 | 61,210 | 60,906 | 61,238 | 61,458 | 62,822 | 63,483 | 72,063 | 73,460 | 72,621 | 72,108 | 72,587 |

Fixed Income Pool - Lehman Brothers

Aggregate Index

January 2002



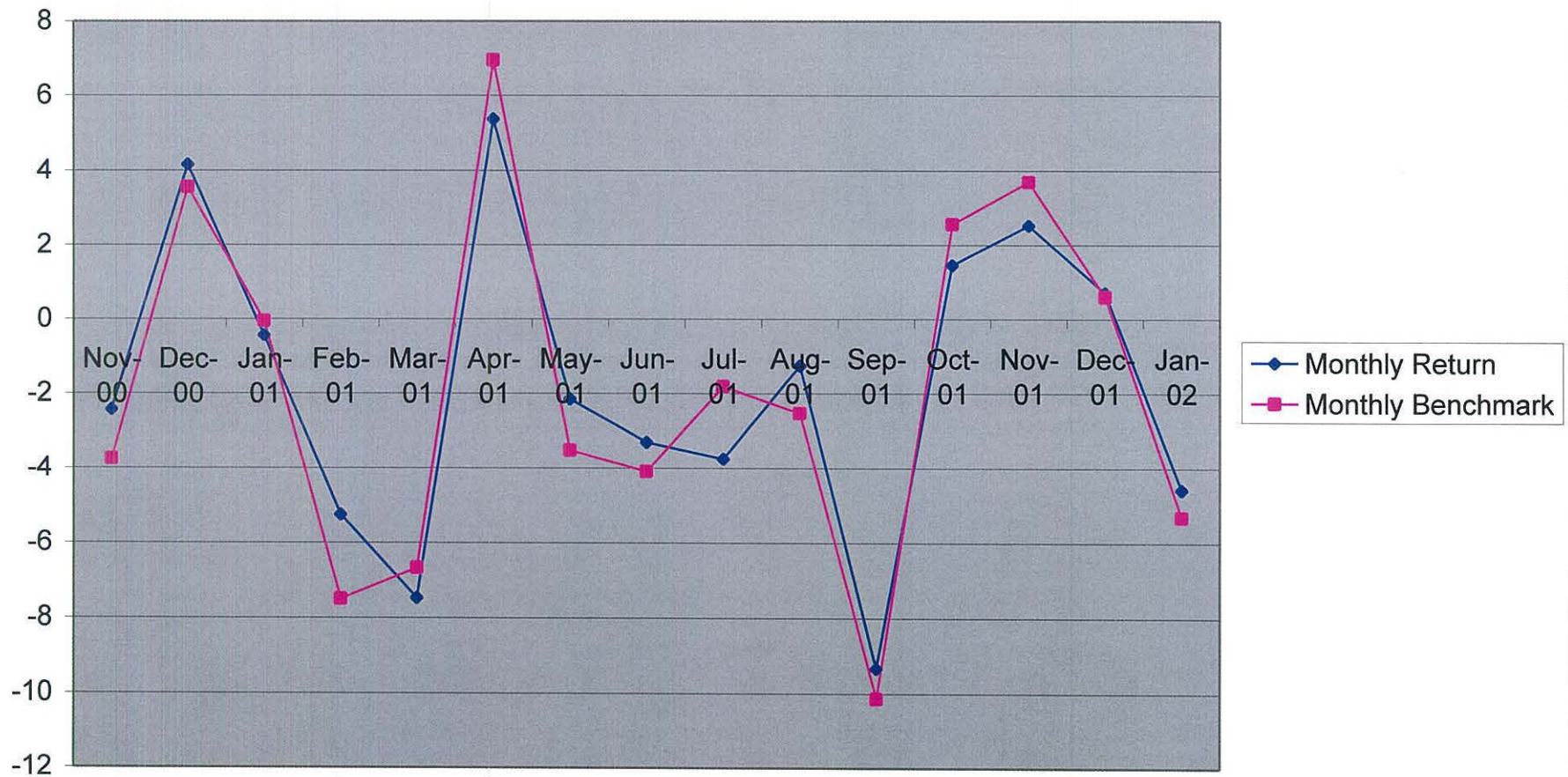
International Equities Pool - Morgan Stanley Capital Intl (EAFE)

NOTE: The increase in assets from August 2001 to September 2001 is due to Exxon's last payment and not earnings.

| | Nov-00 | Dec-00 | Jan-01 | Feb-01 | Mar-01 | Apr-01 | May-01 | Jun-01 | Jul-01 | Aug-01 | Sep-01 | Oct-01 | Nov-01 | Dec-01 | Jan-02 |
|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Monthly Return | -2.43 | 4.16 | -0.44 | -5.25 | -7.47 | 5.37 | -2.15 | -3.31 | -3.75 | -1.26 | -9.33 | 1.45 | 2.52 | 0.7 | -4.58 |
| Monthly Benchmark | -3.75 | 3.55 | -0.05 | -7.5 | -6.67 | 6.95 | -3.53 | -4.09 | -1.82 | -2.53 | -10.13 | 2.56 | 3.69 | 0.59 | -5.31 |
| Market Value (\$M) | 22,541 | 23,479 | 23,375 | 22,148 | 20,494 | 21,593 | 21,128 | 20,430 | 19,664 | 19,416 | 29,844 | 30,275 | 31,039 | 31,256 | 29,826 |

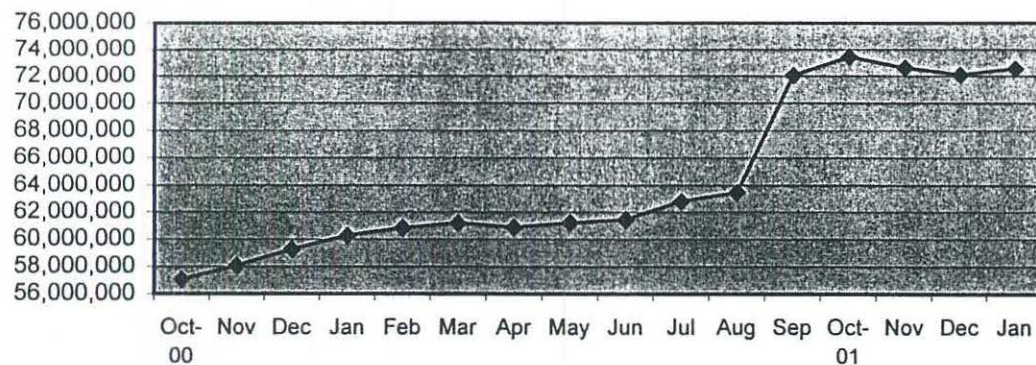
International Equity Pool - Morgan Stanley Capital Intl. (EAFE)

January 2002



| | |
|--------|------------|
| Oct-00 | 57,075,942 |
| Nov | 58,072,794 |
| Dec | 59,288,677 |
| Jan | 60,291,225 |
| Feb | 60,852,550 |
| Mar | 61,209,483 |
| Apr | 60,905,590 |
| May | 61,238,245 |
| Jun | 61,457,699 |
| Jul | 62,822,366 |
| Aug | 63,483,499 |
| Sep | 72,062,627 |
| Oct-01 | 73,460,139 |
| Nov | 72,621,000 |
| Dec | 72,108,186 |
| Jan | 72,587,000 |

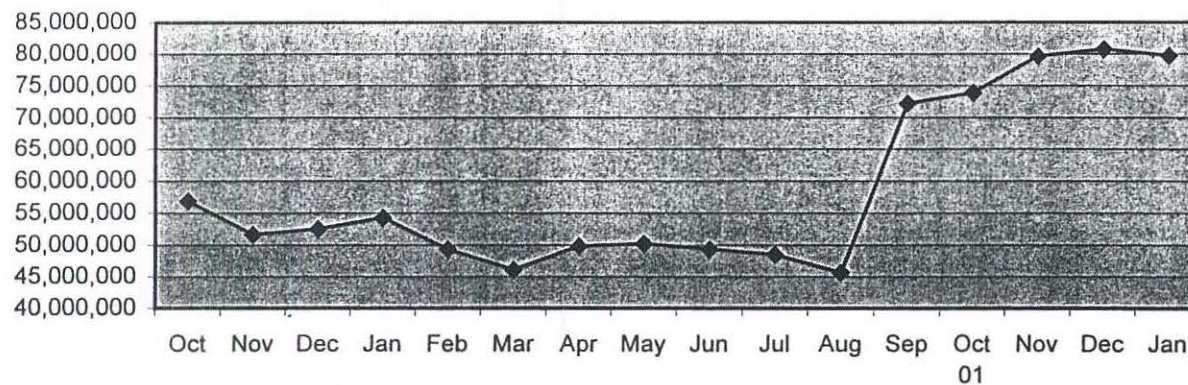
**Exxon Valdez Oil Spill Trustee Council Investment Fund
Fixed Income for FY 01 & FY 02**



Note: September's increased amount is due to contributions from Exxon's last payment.

| | |
|--------|------------|
| Oct | 56,879,447 |
| Nov | 51,648,963 |
| Dec | 52,536,681 |
| Jan | 54,289,747 |
| Feb | 49,329,178 |
| Mar | 46,126,312 |
| Apr | 49,828,183 |
| May | 50,227,785 |
| Jun | 49,293,870 |
| Jul | 48,492,162 |
| Aug | 45,636,080 |
| Sep | 72,290,582 |
| Oct 01 | 73,960,245 |
| Nov | 79,649,000 |
| Dec | 80,755,640 |
| Jan | 79,743,000 |

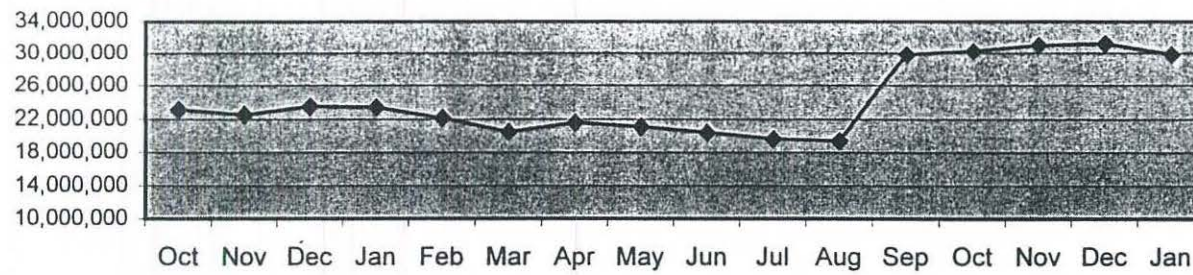
**Exxon Valdez Oil Spill Trustee Council Investment Fund
Domestic Equities for FY 01 & FY 02**



Note: September's increased amount is due to contributions from Exxon's last payment.

| | |
|-----|------------|
| Oct | 23,102,643 |
| Nov | 22,540,761 |
| Dec | 23,478,963 |
| Jan | 23,374,808 |
| Feb | 22,147,519 |
| Mar | 20,493,757 |
| Apr | 21,593,395 |
| May | 21,128,062 |
| Jun | 20,429,757 |
| Jul | 19,663,491 |
| Aug | 19,415,611 |
| Sep | 29,844,062 |
| Oct | 30,275,491 |
| Nov | 31,039,000 |
| Dec | 31,256,254 |
| Jan | 29,826,000 |

**Exxon Valdez Oil Spill Trustee Council
Investment Fund
International Equities for FY 01 & FY 02**



Note: September's increased amount is due to contributions from Exxon's last payment.

2002 Capital Market Outlook Alaska State Pension Investment Board 2/07/02

Michael J. O'Leary CFA
Executive Vice President
Callan Associates Inc.

2002 Capital Market Outlook

Guiding Objectives

- Our best thinking regarding the 5-year outlook, recognizing our median projections will be wrong.
- Results that are readily defensible both for individual asset classes and for total portfolios.
- Reflect common sense and recent market developments.

2002 Capital Market Outlook

Summary of Today's Presentation

- What will be the economic environment over the next five years
- We entered recession in Q2 - the worst may already be past.
- The revenge of fundamentals - prices have fallen but earnings are falling, too. How far away is the earnings bottom?
- What are the risks to the economy? To the capital markets?
- The projections - how they differ from 2001?

The New World in the New Millennium

The Party's Over

2000-2001 have been a remarkable (and painful) run for the U.S.

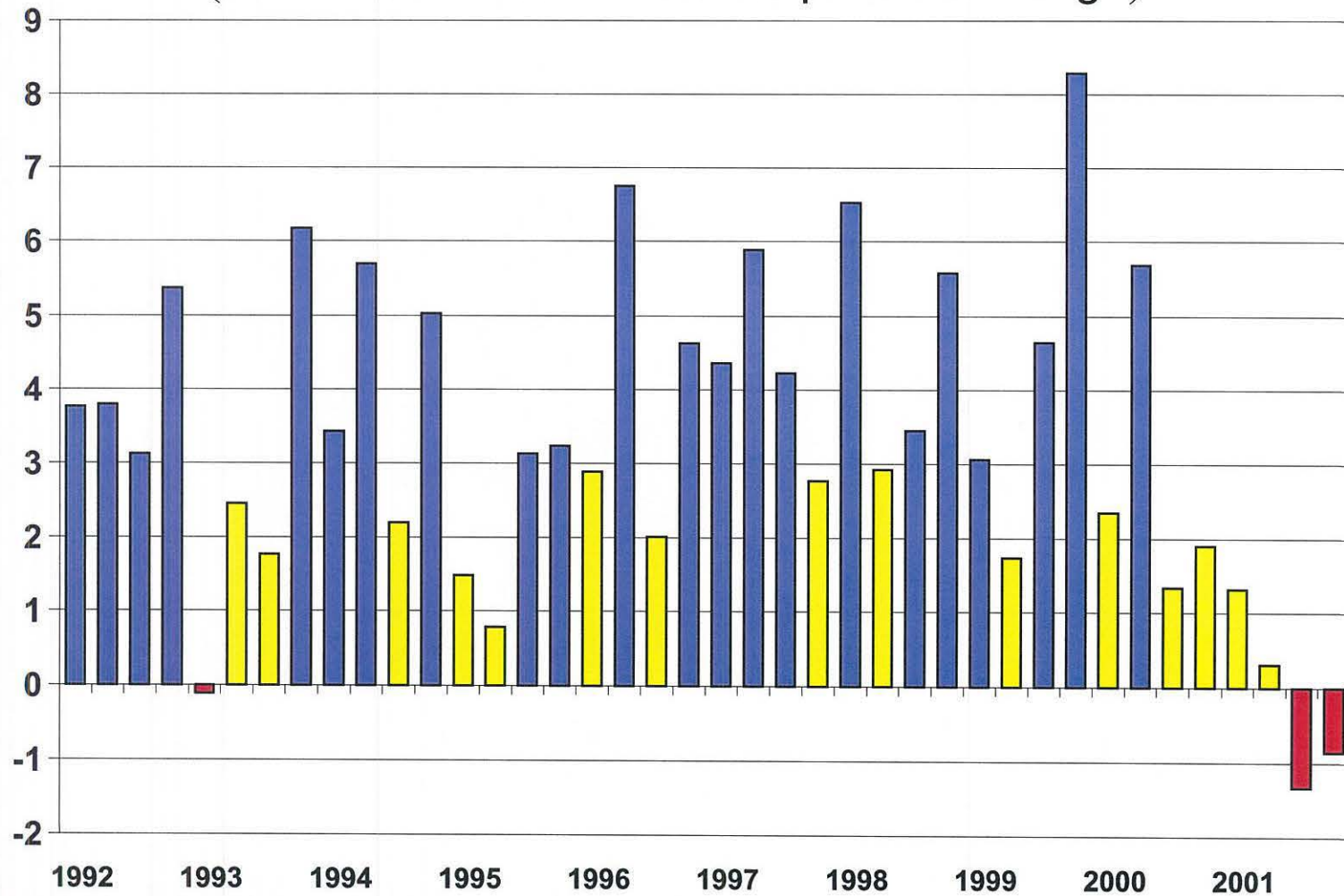
- Technology and dot-com bubble burst.
- Terrorist attacks, ensuing war, and broken confidence. The longest expansion in history ended in March 2001.
- Stock market fell for two consecutive years, the first such decline since 1973-74. S&P 500 is down 21.7% since March 2000; NASDAQ is off 57.2%.
- The Fed cut interest rates 11 times (4.75%), the steepest cut in history. Interest rates are near a 40-year low.
- Much-touted federal surplus sighted in fiscal 2000, only to disappear again in the current fiscal year.

The Current Economic Environment

- U.S. economy officially peaked in March 2001, thus entering recession in the second quarter of the year.
- Christmas may have been merrier than expected, and data suggest a fourth quarter growth rate near zero. The recession may already be technically over.
- However:
 - ✓ Corporations are still retrenching.
 - ✓ Investors are bewildered - high cash levels, where to invest?
 - ✓ The stock market still looks overvalued by many standards.
 - ✓ Layoffs are high and rising.
 - ✓ The savings rate is still very low (1%).
 - ✓ Consumer debt is very high (104% of disposable income).
 - ✓ The trade gap is hitting records.
 - ✓ Low interest rates can't eliminate excess capacity.

GDP Growth Heads Into Recession

(Real GDP Growth - annual percent change)



Many Overseas Economies Are in or Near Recession

North America

U.S.
Canada
Mexico

Asia

Japan
Taiwan
Hong Kong
Singapore
Malaysia

Latin America

Argentina
Peru

Western Europe

Germany
Italy
Belgium
Austria

Emerging Europe

Turkey
Poland

U.S. Recession Will Be Relatively Mild

The Worst May Have Already Passed

(Source: DRI-WEFA)

| Recession | Duration, Months | Real GDP % Decline | Unemployment Rate Peak |
|--------------------|-----------------------------|-------------------------------|-----------------------------------|
| 2001 - 2002 | 10 | -1.0% | 6.3% |
| 1990 - 1991 | 8 | -1.5% | 7.8% |
| 1981 - 1982 | 16 | -2.9% | 10.8% |
| 1980 | 6 | -2.2% | 7.8% |
| 1973 - 1975 | 16 | -3.4% | 9.0% |
| 1969 - 1970 | 11 | -0.6% | 6.1% |
| 1960 - 1961 | 10 | -1.6% | 7.1% |

Despite the Gulf War Analogies, This Downturn Differs From 1990-91

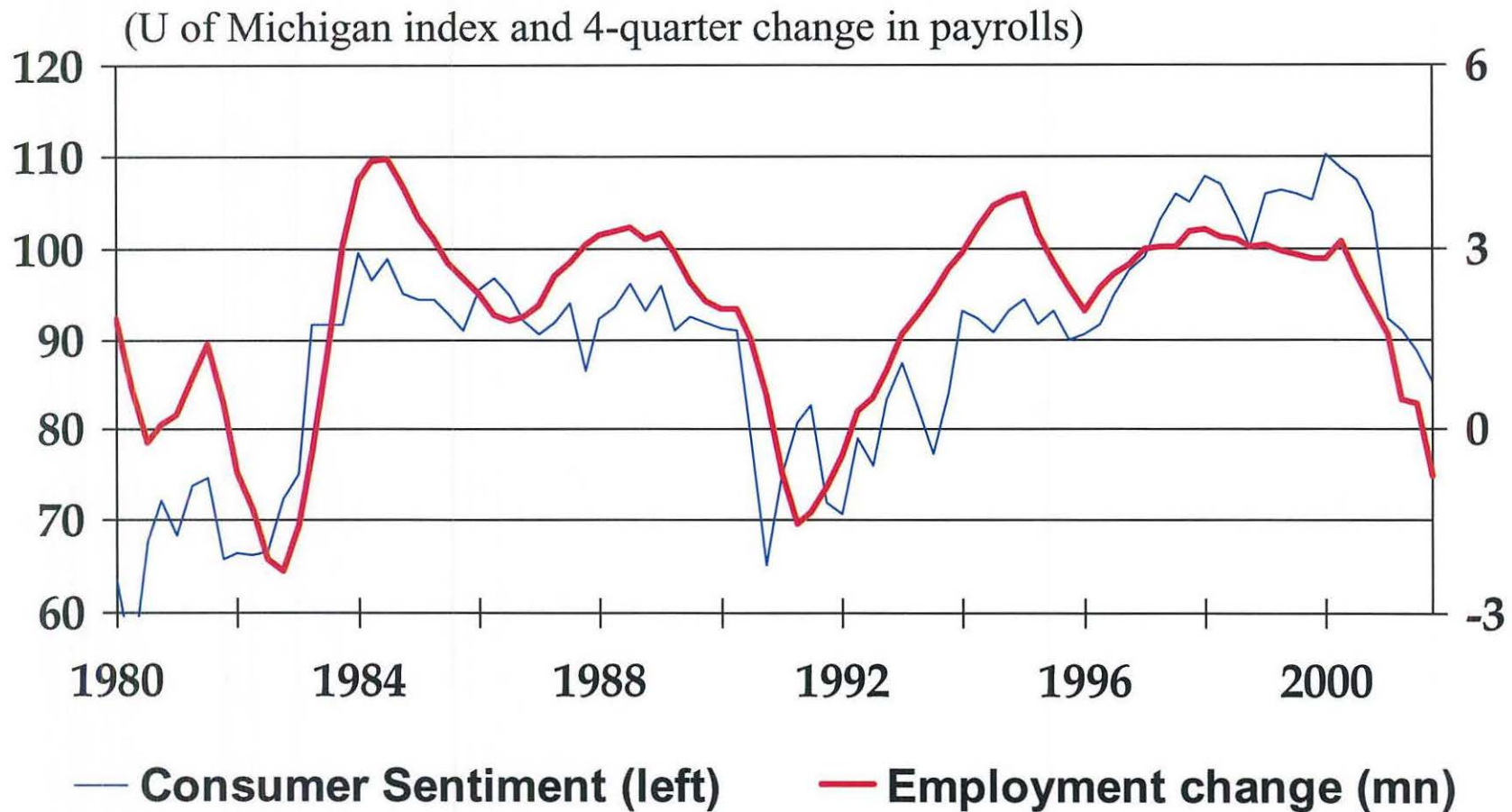
- Negative Differences:
 - ✓ The terrorist attacks.
 - ✓ More synchronized global cycle.
 - ✓ High tech investment crash.
- Positive Differences:
 - ✓ Sharp decline in energy costs.
 - ✓ Stronger banking system.
 - ✓ More balanced real estate markets.
 - ✓ Stronger fiscal and monetary policy response - Mr. Greenspan learned his lessons.

The Consumer Dominates Growth

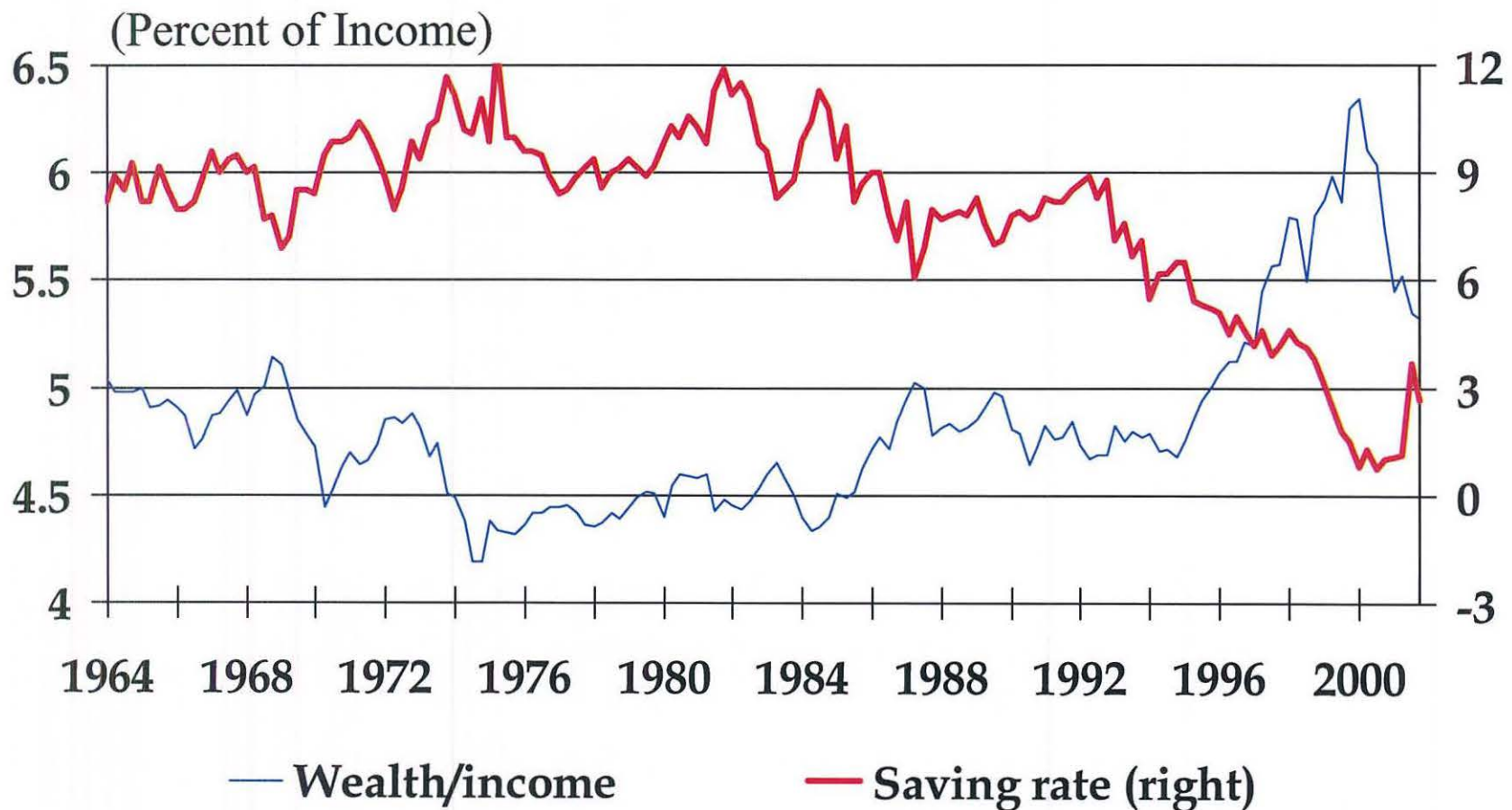
...and a Fearful Consumer is Cause for Concern

- Consumers buy 2/3 of production.
- Household wealth remains high relative to income.
- However, debts and defaults are at record levels and the savings rate is barely positive.
- While the tax cut provided extra income, and lower mortgage rates are freeing up funds.
- Consumer confidence almost entered a free-fall.
 - ✓ Fear and layoffs are a deadly combination.
 - ✓ Stock market did our saving for us, freeing us up to spend, but it is now destroying wealth.
 - ✓ Auto sales suggest consumers are willing to spend, given incentives.
 - ✓ Confidence rebounded in December.

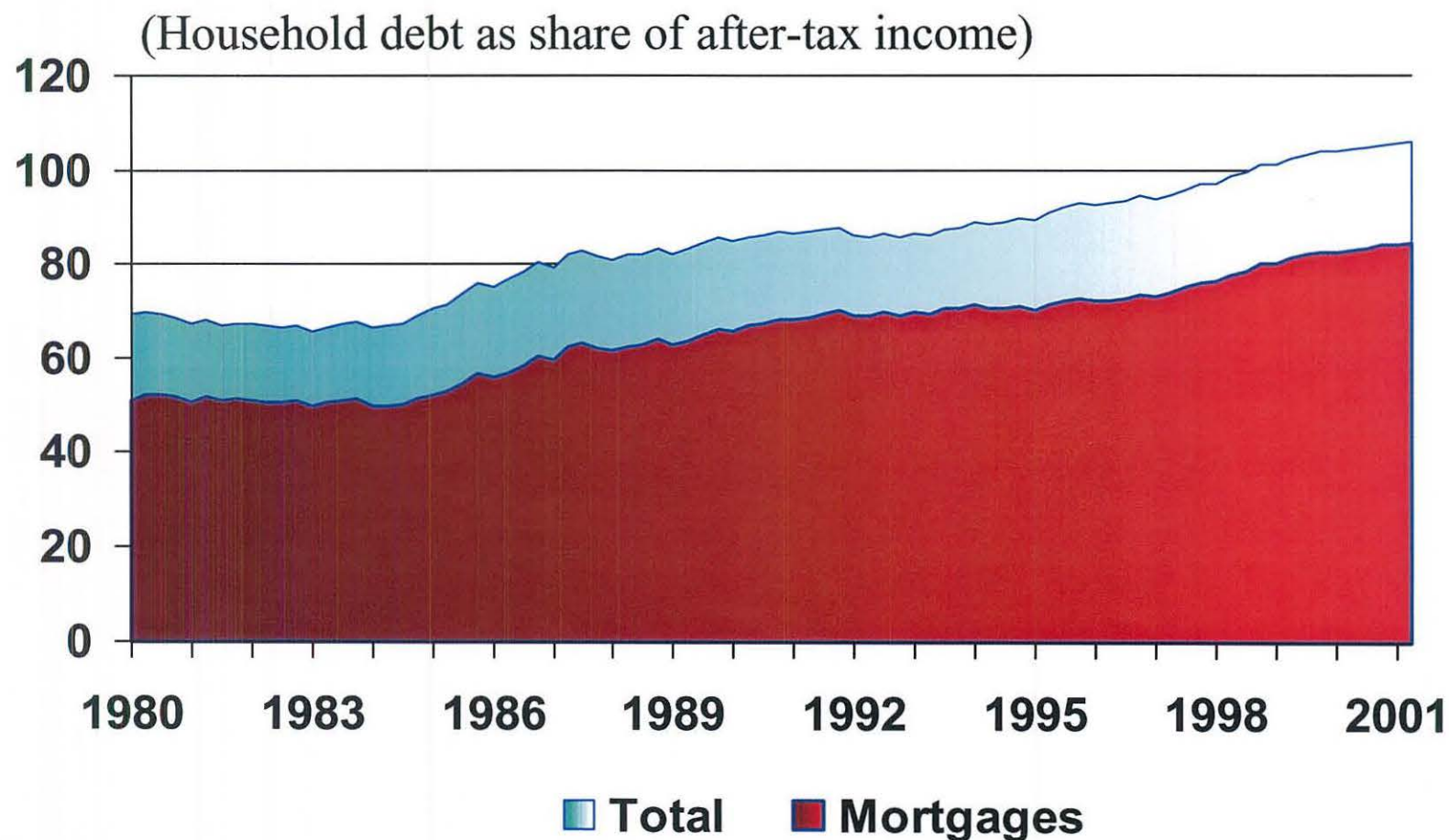
Confidence Follows Jobs



Saving Plunged as Wealth Hit a Record High

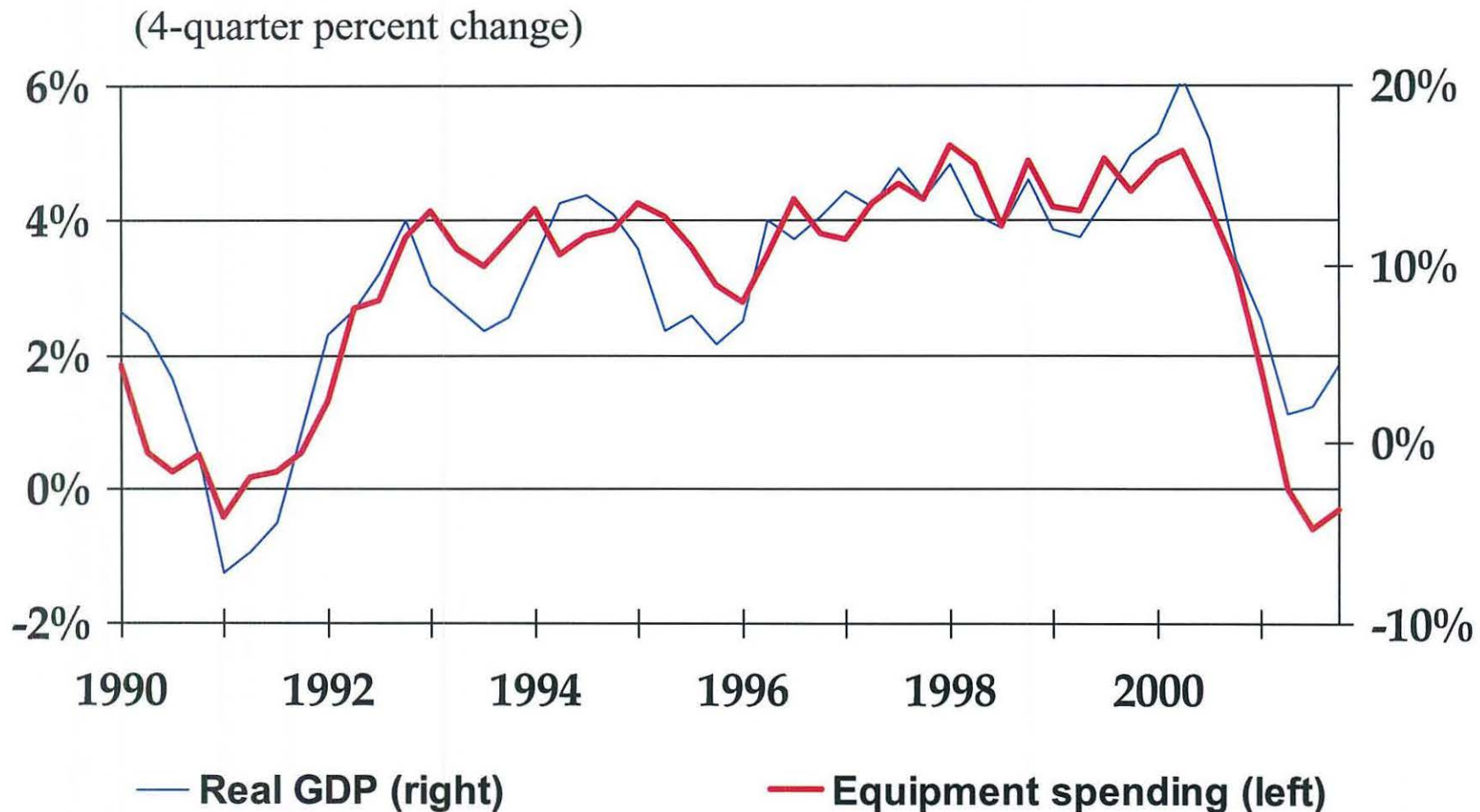


Debt is Hitting New Records, Dominated by Mortgages



Capital Investment Follows GDP

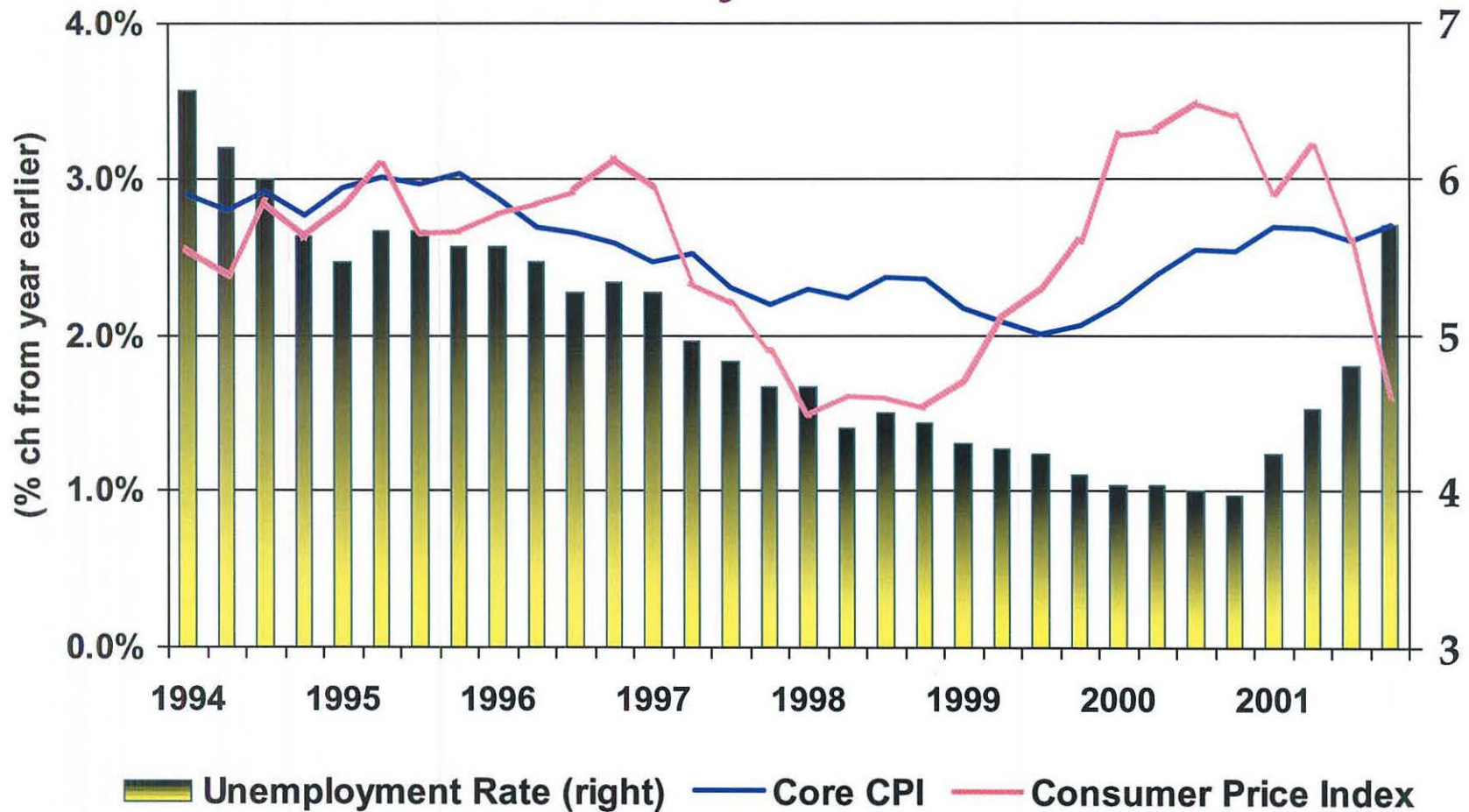
Corporations Are More Cautious Than Consumers



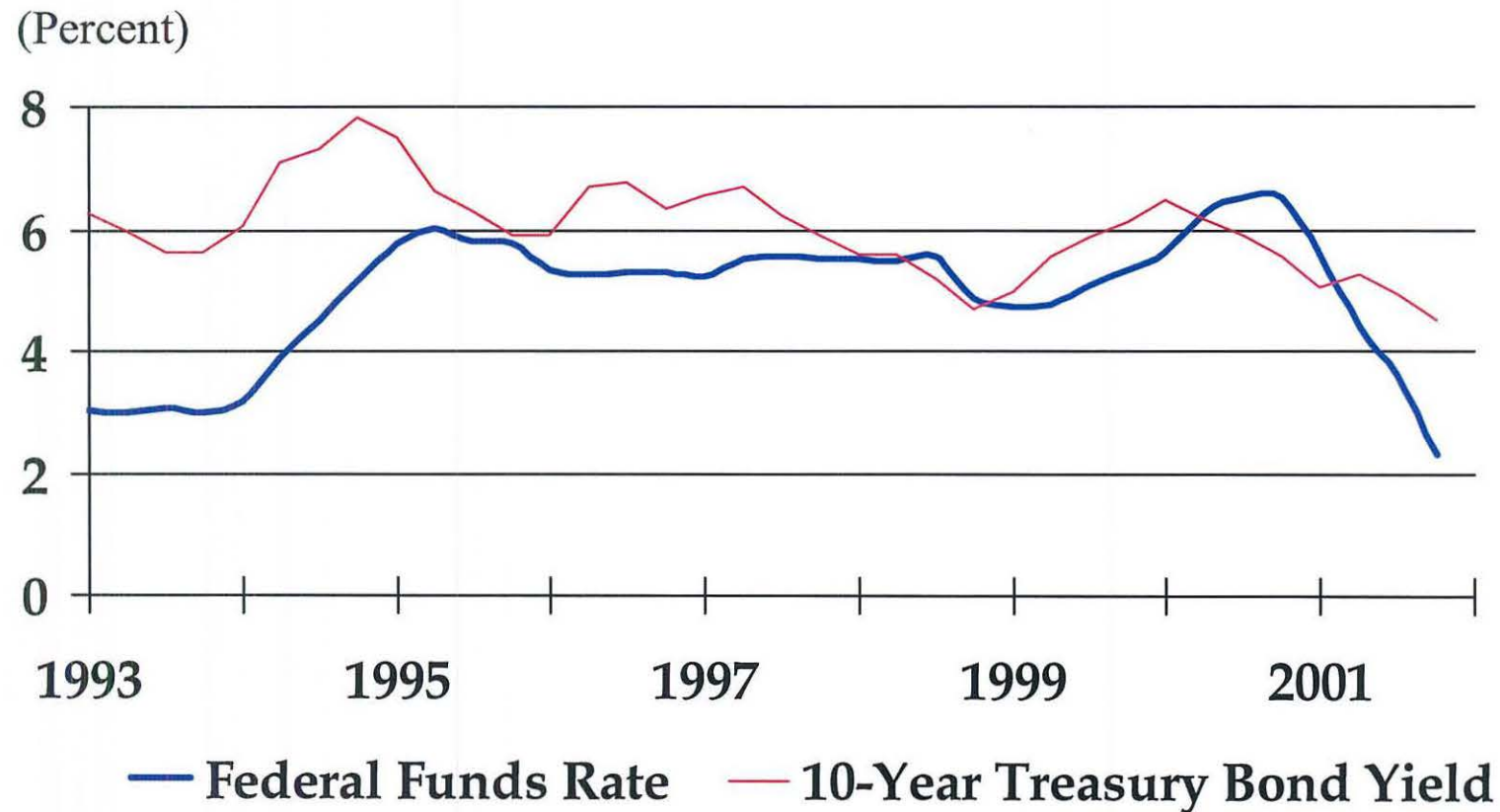
Corporations Are Still More Cautious Than Consumers

- Capital spending has been slashed.
- Inventories have been run off dramatically.
- Payrolls have been shaved.
- However, capital spending is not likely to recover under orders start showing up on the books. Thus far, only defense orders are climbing.
- Recovery will not be smooth - some industries are plagued by overcapacity.
- Employment lags the economy - layoffs are likely to continue in 2002. Companies will not be rehiring until they are sure that the orders will continue.

Inflation Will Decelerate as the Economy Softens



The Fed Has Loosened Quickly *4.75% in 11 Rate Cuts - Are They Done?*



Capital Markets Confront the Law of Gravity

| | <u>1999 Returns</u> | <u>2000 Returns</u> | <u>2001 Returns</u> |
|--------------------------|---------------------|---------------------|---------------------|
| Callan Broad | 22.74 | -9.79 | -11.96 |
| S&P Super Composite 1500 | 20.27 | -6.98 | -10.64 |
| S&P 500 | 21.04 | -9.10 | -11.88 |
| Callan Small | 33.87 | 0.23 | -2.45 |
| S&P 600 Small Cap | 12.40 | 11.80 | 6.54 |
| Russell 2000 | 21.26 | -3.02 | 2.49 |
| EAFE | 26.96 | -14.17 | -21.44 |
| NASDAQ | 86.10 | -39.18 | -20.80 |
| LB Agg | -0.82 | 11.63 | 8.43 |
| SB Non-US | -5.07 | -2.63 | -3.54 |

U.S. Economic Forecast: Consensus on Recovery in 2002

- The recession will be relatively mild, with growth returning in the second half of the year.
 - The Fed switched quickly from recession avoidance to seeding recovery, but don't expect more rate cuts.
 - Consumers have proven resilient, and the recovery depends on the consumer (although there is little pent-up demand).
 - Inflation will remain benign.
 - The rest of the world will suffer from a U.S. slowdown.
 - Fiscal policy will be very expansionary, even without a specific stimulus package.
 - Exports and investment will lag.
- Our Capital Market projections incorporate our economic expectations.

Capital Market Projection Process

- Evaluate the current environment and economic outlook for the U.S. and other major industrial countries.
- Examine the relationships between the economy and asset class performance patterns.
- Examine recent and long-run trends in asset class performance, and create risk, return and correlation projections.
- Test the projections for reasonable results.

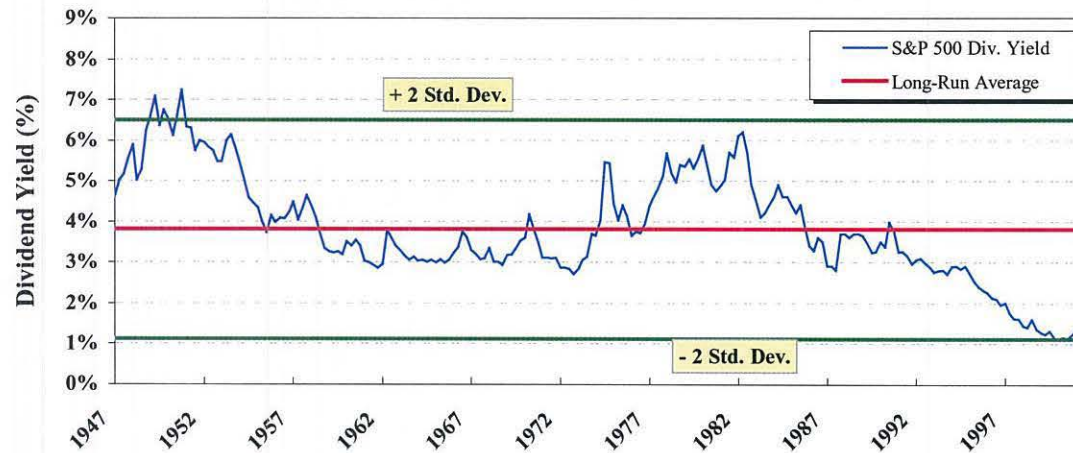
Stock Fundamentals Matter More Than Ever

(...although we were starting to wonder)

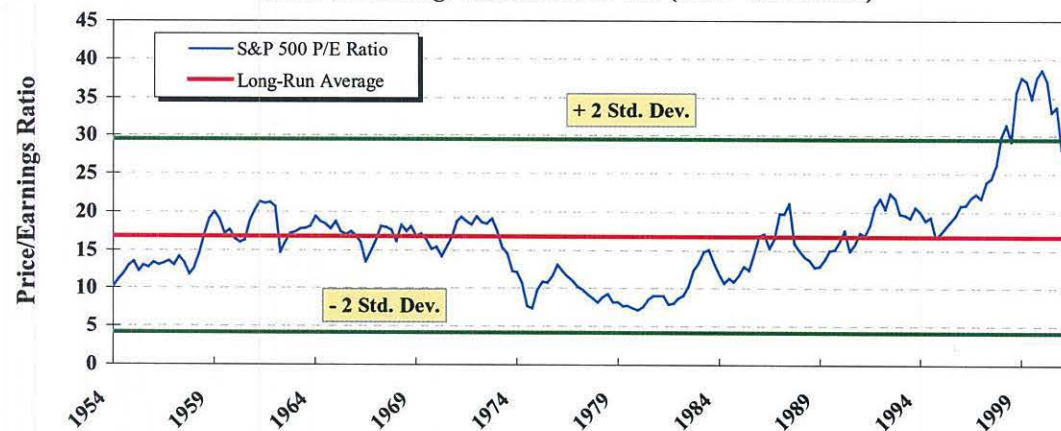
- P/E ratios hit astoundingly heights, and were inconsistent with long-term interest rates
 - prices may be falling, but earnings are plummeting. When do we get to “reasonable” prices?
 - price depreciation during 2000 began with weakening earnings (or even weakening expectations). Fear overtook in 2001.
 - it is still difficult to make many quantitative models justify expected real returns in the near future.
- We retain our bias towards long-run averages.

The Last Few Years Were More Than a Little Unusual

Dividend Yield of S&P 500 (1947 - 12/31/2001)



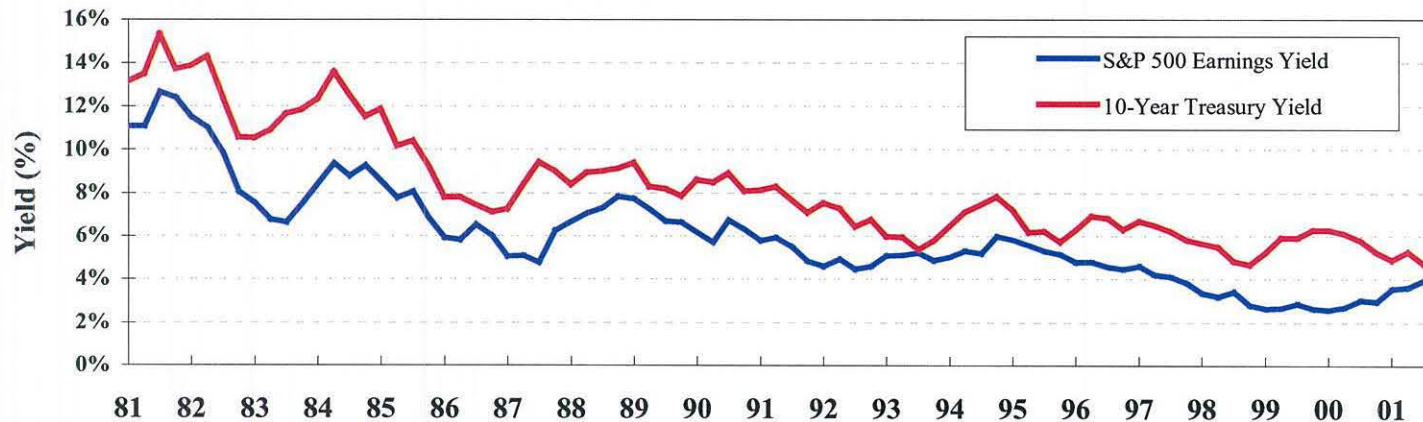
Price to Earnings Ratio for S&P 500 (1954 - 12/31/2001)



Equity Valuations Now in Line?

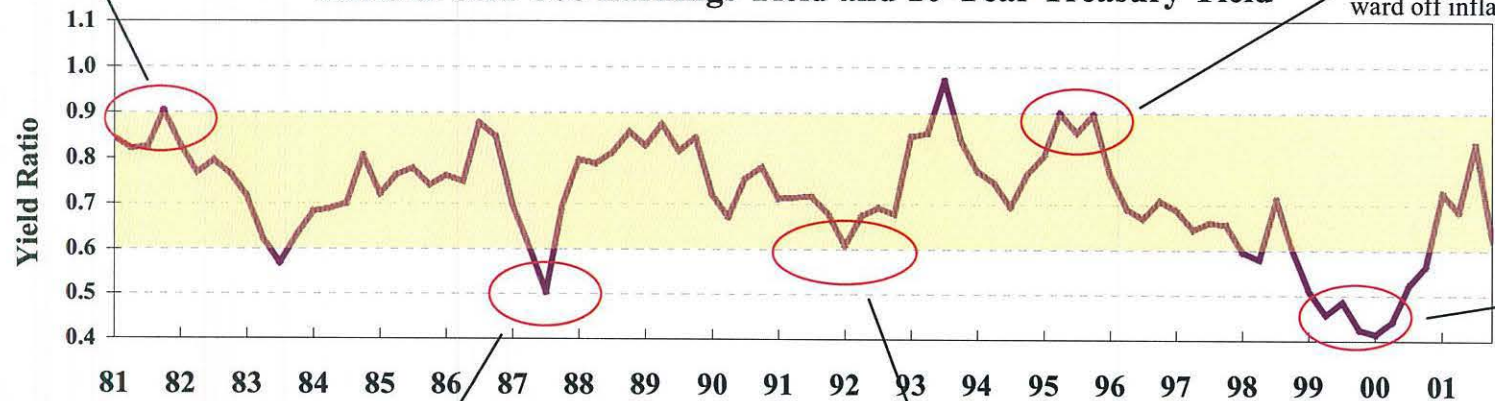
The Ever-Popular Greenspan Model

S&P 500 Earnings Yield vs. 10-Year Treasury Yield



Peak of interest rates and inflation

Ratio of S&P 500 Earnings Yield and 10-Year Treasury Yield



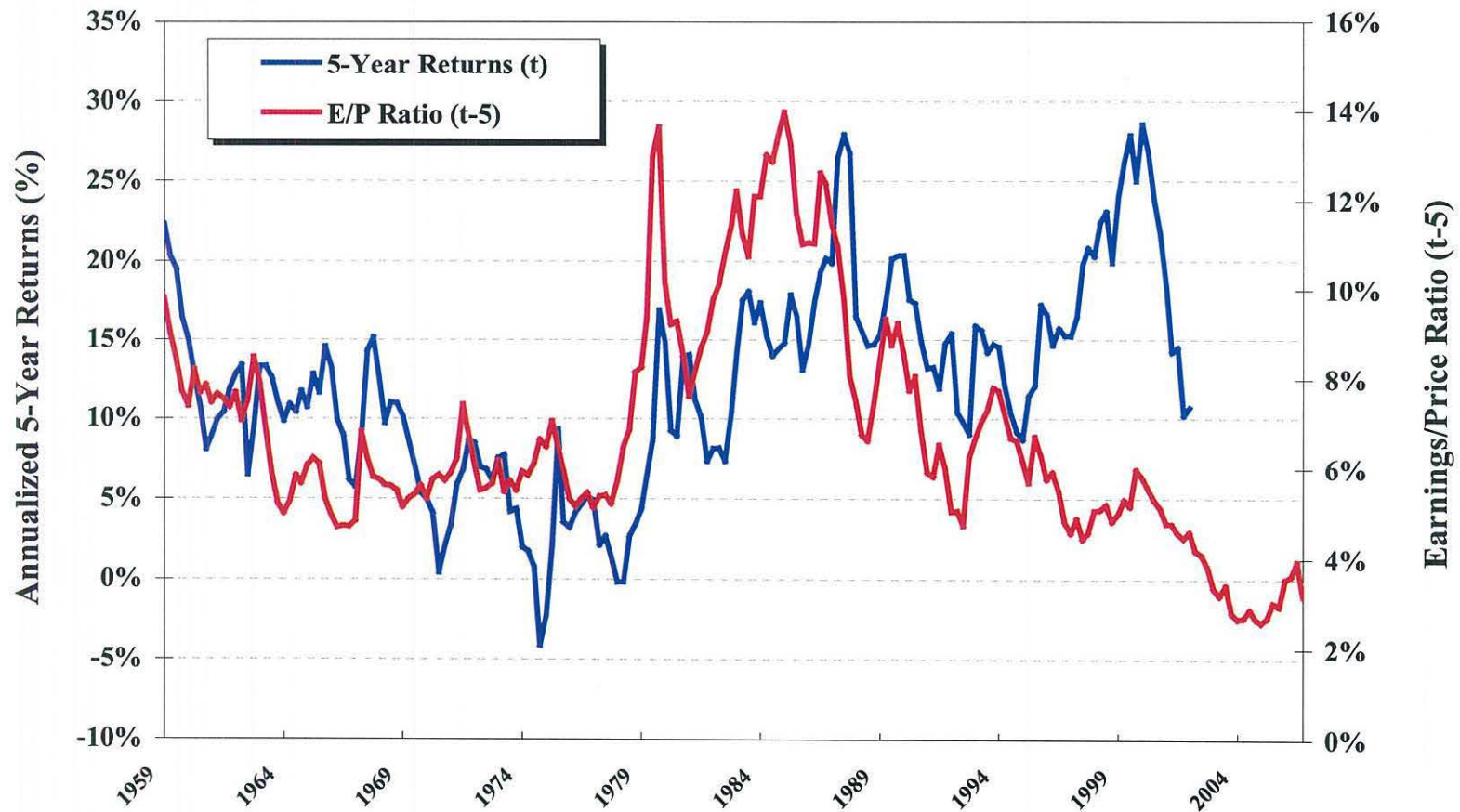
1987 Market Crash

Fed tardy in raising interest rates

Rising rates,
falling earnings

Are Equity Prices Becoming Re-connected to Their Underlying Value?

S&P 500 5-Year Returns vs. Lagged Earnings/Price (1954 - 2001)



Why Bother With Bonds?

Because of Years Like 2000 & 2001

- Plan sponsors are finally enjoying the diversification benefit of bonds.
- Bond yields trended down during the first three quarters as the recession emerged, then plummeted in the flight to quality following September 11. Yields moved back up at the end of the year as the stock market recovered.
- The yield curve steepened dramatically during 2001. The 475 basis points in interest rate reductions by the Fed had only a modest effect on longer-term rates. Money-market rates are now below inflation, implying negative real yield. The elimination of the 30-year Treasury bond had a greater impact on the long term rates than the rate cuts.
- Our forecast implies a slight rise in return over the current yield over the next five years.

Impact of September 11 Was Substantial But Largely Temporary

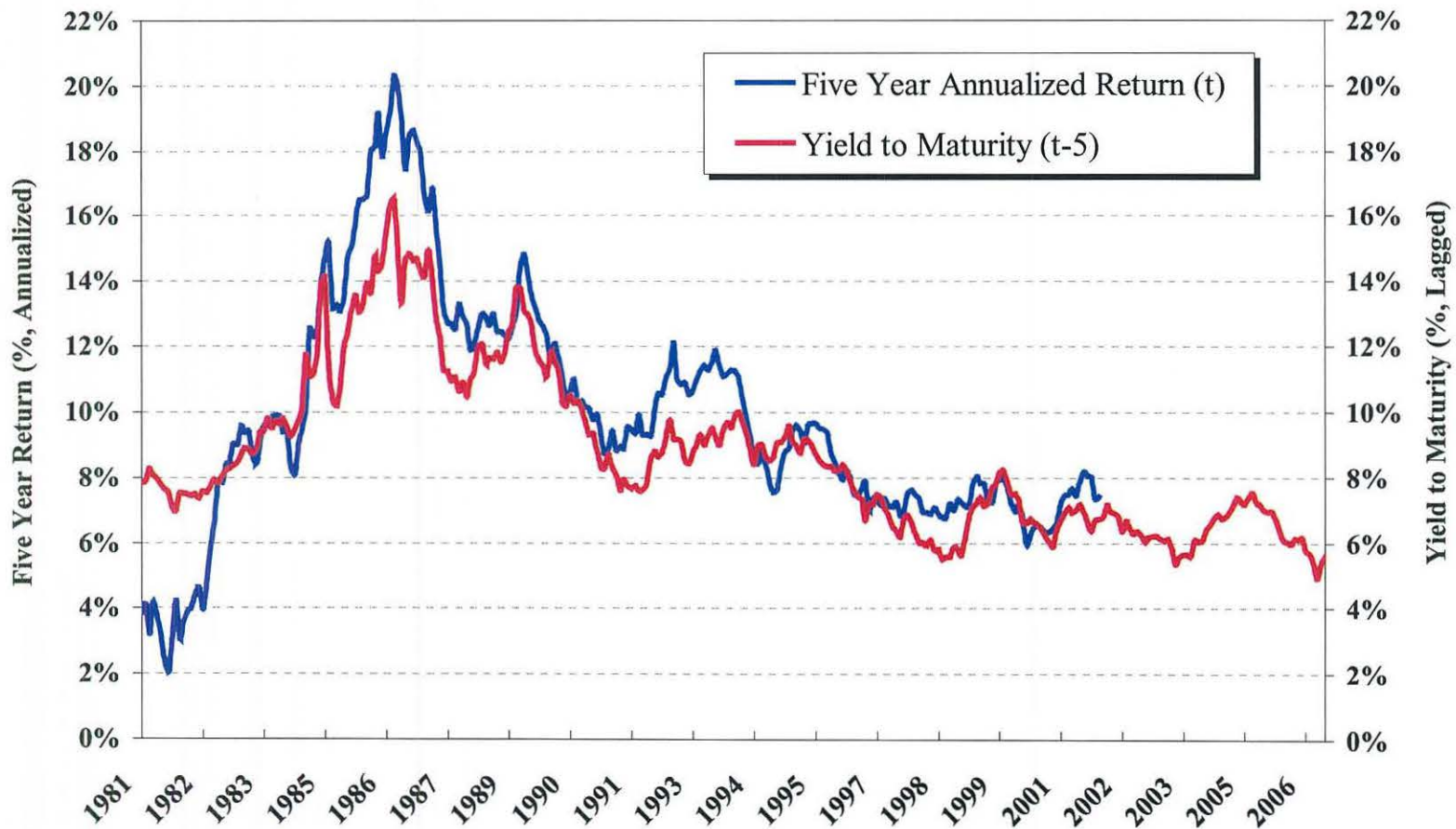
Lehman Aggregate Index - 2001 Daily Yield to Maturity (Yield to Worst)



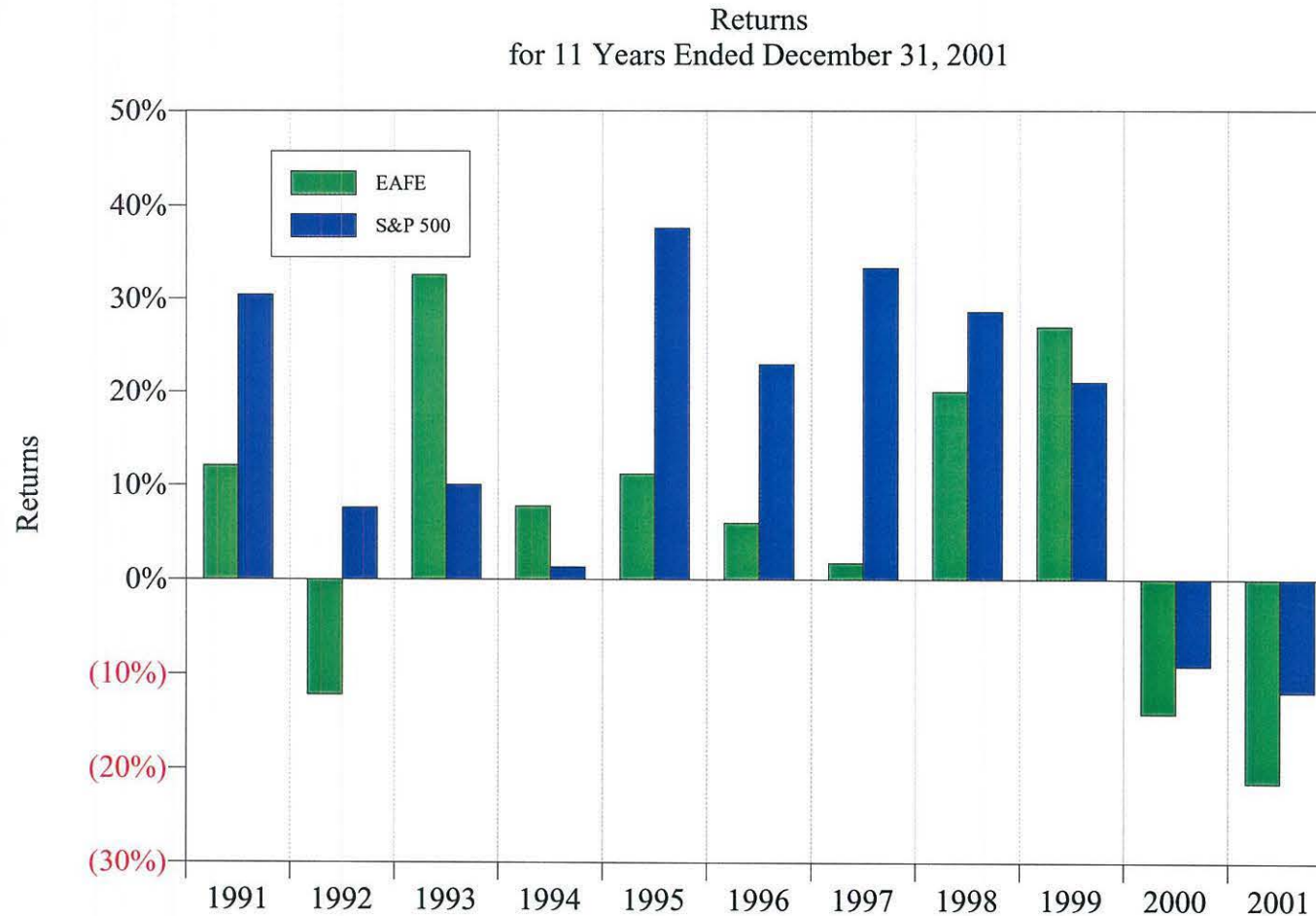
Domestic Fixed Income

Current Yield Is A Strong Predictor of Returns

Lehman Aggregate Index 5 Year Returns vs. Lagged Yield to Maturity

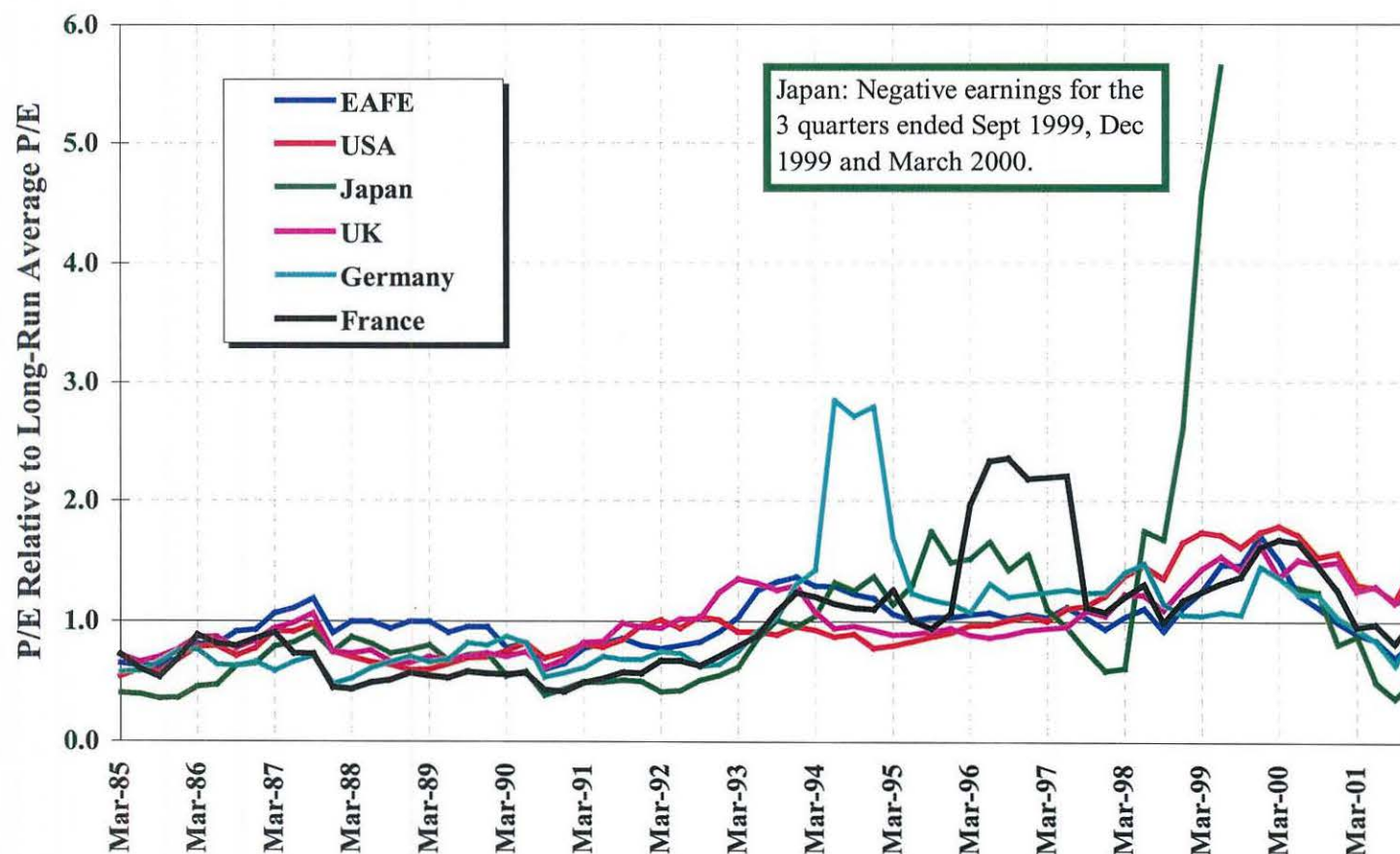


International Equities Hammered Again - Poised for Their Day in the Sun?



International Valuations Are Still Attractive Compared to the U.S.

Price/Earnings Ratio Relative to Long-Run Average
for Major EAFE Countries and USA



2002 Capital Market Projections

2002 Capital Market Projections

| Asset Class | Index | Projected Annual Return | Projected Standard Deviation (Risk) | 2001 Projections | |
|-------------------------|------------------|-------------------------|-------------------------------------|------------------|-------|
| Equities | | | | | |
| Broad Domestic Equity | CAI Broad | 9.30% | 17.20 | 9.20 | 16.30 |
| Large Cap | S&P 500 | 9.00% | 16.00 | 8.90 | 15.00 |
| Small Cap | CAI Small | 10.60% | 25.00 | 10.40 | 25.00 |
| International Equity | EAFE | 9.90% | 21.50 | 9.80 | 21.50 |
| Emerging Markets Equity | MSCI EMF | 10.40% | 35.00 | 10.30 | 35.00 |
| Global Broad Equity | 90% EAFE/10% EMF | 9.95% | 21.15 | | |
| Fixed Income | | | | | |
| Domestic Fixed | LB Agg | 5.75% | 5.00 | 6.45 | 5.30 |
| Defensive | LB Gov't 1-3 | 4.60% | 2.60 | 5.30 | 3.30 |
| High Yield | FB High Yield | 7.50% | 12.65 | 7.50 | 11.40 |
| Non US\$ Fixed | SB Non US | 5.60% | 9.60 | 6.25 | 9.80 |
| Other | | | | | |
| Real Estate | CRES | 8.00% | 16.50 | 8.30 | 16.50 |
| Alternative Investments | VECO 100 | 12.25% | 35.00 | 12.00 | 36.00 |
| Cash Equivalents | T-bill | 3.50% | 0.70 | 5.00 | 0.70 |
| Inflation | CPI-U | 2.90% | 1.00 | 3.25 | 1.90 |

2002 Capital Market Projections

- Largest changes are to returns for cash and bonds.
- Inflation has risen over the past two years, but the threat of further price acceleration is fading.
- Bond returns are lower, reflecting lower yields to maturity compared to a year ago.
- Equity return expectations remain essentially unchanged - below the long-run averages.
- We remain convinced that international belongs in a diversified portfolio, despite the second-worst absolute performance in 20 years.
- Real estate returns are reduced slightly.
- Private equity returns are increased slightly.

2002 Correlation Coefficient Matrix

Key to Constructing Efficient Portfolios

2002 Correlation Matrix

| | Broad | Lrg Cap | Sml Cap | Int'l Eq | Emerg | Global Br | Dom Fix | Defensive | Hi Yield | NUS Fix | Real Est | Alt Inv | T-Bill |
|----------------|-------|---------|---------|----------|-------|-----------|---------|-----------|----------|---------|----------|---------|--------|
| Broad Dom Eq | 1.00 | | | | | | | | | | | | |
| Large Cap Eq | 0.96 | 1.00 | | | | | | | | | | | |
| Small Cap Eq | 0.92 | 0.84 | 1.00 | | | | | | | | | | |
| Int'l Equity | 0.76 | 0.75 | 0.70 | 1.00 | | | | | | | | | |
| Emerging Mkts | 0.53 | 0.51 | 0.51 | 0.45 | 1.00 | | | | | | | | |
| Global Broad | 0.78 | 0.77 | 0.72 | 0.99 | 0.58 | 1.00 | | | | | | | |
| Domestic Fixed | 0.28 | 0.30 | 0.20 | 0.22 | 0.15 | 0.23 | 1.00 | | | | | | |
| Defensive | 0.27 | 0.29 | 0.20 | 0.20 | 0.00 | 0.18 | 0.94 | 1.00 | | | | | |
| High Yield | 0.70 | 0.69 | 0.63 | 0.50 | 0.35 | 0.52 | 0.45 | 0.44 | 1.00 | | | | |
| Non \$US Fixed | 0.01 | 0.03 | -0.03 | 0.17 | -0.06 | 0.15 | 0.38 | 0.40 | 0.11 | 1.00 | | | |
| Real Estate | 0.60 | 0.59 | 0.53 | 0.50 | 0.35 | 0.52 | 0.27 | 0.30 | 0.45 | 0.05 | 1.00 | | |
| Alt Inv | 0.68 | 0.68 | 0.62 | 0.63 | 0.55 | 0.67 | 0.25 | 0.20 | 0.45 | 0.10 | 0.42 | 1.00 | |
| T-Bills | -0.12 | -0.10 | -0.15 | -0.25 | -0.15 | -0.25 | 0.30 | 0.28 | 0.07 | -0.05 | -0.06 | 0.07 | 1.00 |

Optimizations - Where The Rubber Meets the Road

- The 2002 efficient frontier is “steeper” and shifted to the right compared to last year’s frontier.
- Compared to last year, portfolios with the same targeted level of return have a higher level of risk.
- Portfolios with the same targeted percentage of equities face lower returns but higher expected risk.
- Small cap stocks account for a similar percentage of domestic equity (approximately 20%) across mixes reflecting a long-run neutral bias toward market capitalization.
- International equities account for a similar percentage of the total equity allocation (approximately 30%) across all mixes.
- Allocations to domestic fixed income are lower across almost all mixes.

What Can Go Wrong?

Risks on the Horizon

- Benign inflation and relatively few sharp imbalances will help spur a strong recovery. However, downside risks remain large:
 - ✓ Further terror attacks, or
 - ✓ Extended warfare in the Middle East, leading to
 - ✓ Sharply rising oil prices, which could
 - ✓ Deepen and prolong the recession.
 - ✓ Excess capacity problem could be worse than expected, requiring further inventory liquidation.
- Should economic activity turn around on its own, the huge amount of monetary and fiscal stimulus in the pipeline could be excessive, setting up inflation and speculative investment, requiring future Fed response.

2002 vs. 2001 Comparison

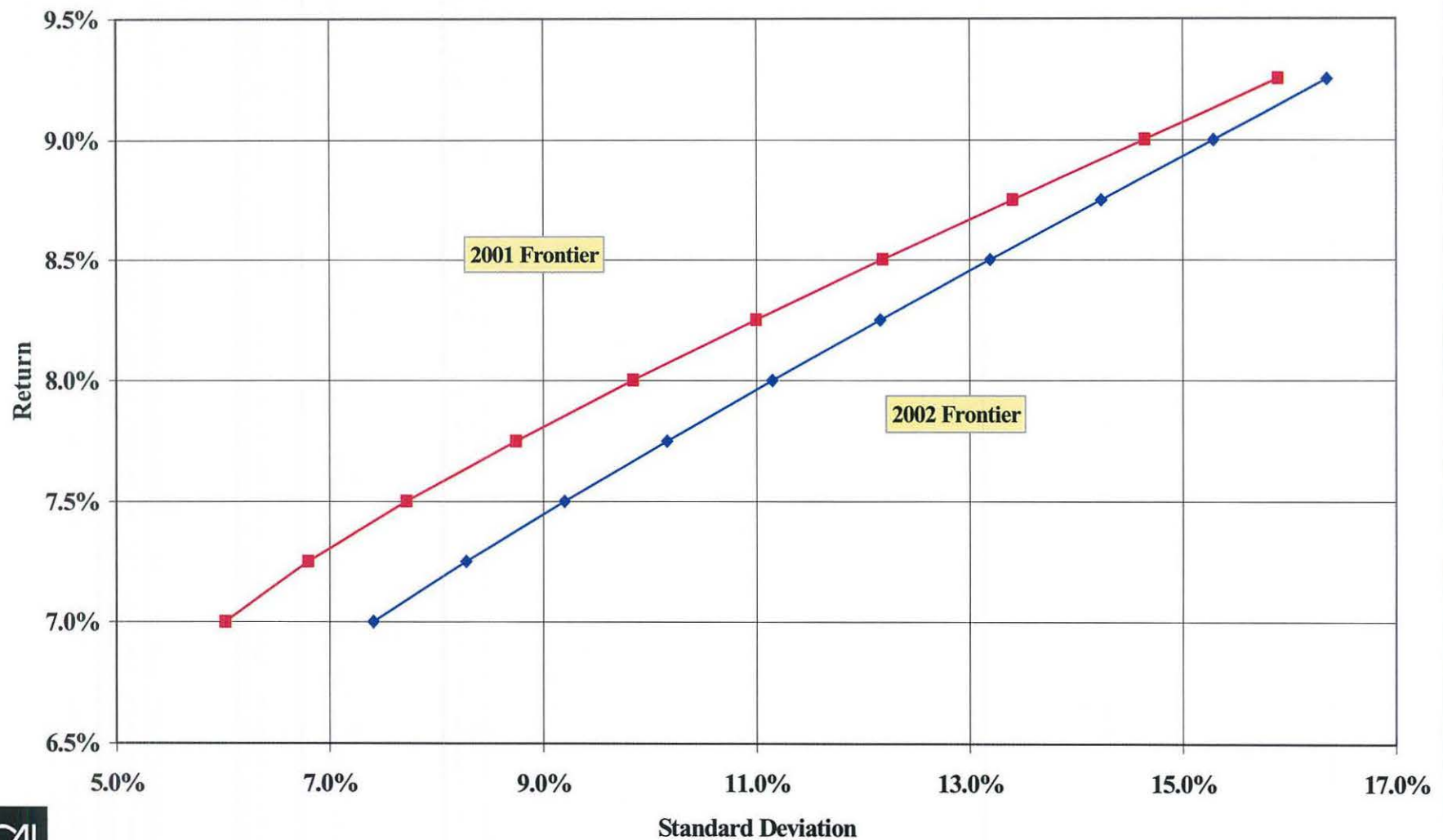
| 2002 | | Limits | | Asset Mix Alternatives | | | | | | | | |
|---------------------|-----|--------|-------|------------------------|-------|--------|--------|--------|--------|--------|--------|--------|
| Asset Classes | Min | Max | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Large Dom Eq | 0% | 100% | 18% | 21% | 25% | 28% | 31% | 35% | 38% | 41% | 45% | 48% |
| Small Dom Eq | 0% | 100% | 4% | 5% | 6% | 7% | 8% | 8% | 9% | 10% | 11% | 12% |
| International Eq | 0% | 100% | 8% | 10% | 12% | 14% | 16% | 18% | 20% | 22% | 24% | 26% |
| Dom Fixed | 0% | 100% | 57% | 51% | 45% | 38% | 32% | 26% | 19% | 13% | 6% | 0% |
| International Fixed | 0% | 100% | 6% | 6% | 5% | 5% | 4% | 4% | 3% | 3% | 2% | 2% |
| Real Estate | 0% | 100% | 6% | 6% | 7% | 8% | 8% | 9% | 10% | 10% | 11% | 12% |
| Cash | 0% | 100% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Totals | | | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Projected Return | | | 7.00% | 7.25% | 7.50% | 7.75% | 8.00% | 8.25% | 8.50% | 8.75% | 9.00% | 9.25% |
| Projected Risk | | | 7.41% | 8.28% | 9.20% | 10.16% | 11.15% | 12.16% | 13.19% | 14.24% | 15.29% | 16.35% |

| 2001 | | Limits | | Asset Mix Alternatives | | | | | | | | |
|---------------------|-----|--------|-------|------------------------|-------|-------|-------|--------|--------|--------|--------|--------|
| Asset Classes | Min | Max | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Large Dom Eq | 0% | 100% | 12% | 16% | 20% | 23% | 28% | 32% | 36% | 40% | 44% | 48% |
| Small Dom Eq | 0% | 100% | 3% | 3% | 4% | 6% | 7% | 8% | 9% | 10% | 11% | 13% |
| International Eq | 0% | 100% | 5% | 7% | 10% | 12% | 14% | 17% | 20% | 22% | 25% | 27% |
| Dom Fixed | 0% | 100% | 65% | 64% | 56% | 48% | 40% | 32% | 24% | 16% | 8% | 0% |
| International Fixed | 0% | 100% | 6% | 6% | 5% | 5% | 4% | 3% | 2% | 2% | 1% | 0% |
| Real Estate | 0% | 100% | 4% | 4% | 5% | 6% | 7% | 8% | 9% | 10% | 11% | 12% |
| Cash | 0% | 100% | 5% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Totals | | | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Projected Return | | | 7.00% | 7.25% | 7.50% | 7.75% | 8.00% | 8.25% | 8.50% | 8.75% | 9.00% | 9.25% |
| Projected Risk | | | 6.03% | 6.81% | 7.72% | 8.75% | 9.85% | 11.00% | 12.19% | 13.41% | 14.65% | 15.90% |

| 2002-2001 | | Limits | | Asset Mix Alternatives | | | | | | | | |
|------------------|-----|--------|----|------------------------|----|----|----|----|----|----|-----|-----|
| Asset Classes | Min | Max | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Large Dom Eq | 0% | 100% | 6% | 5% | 5% | 5% | 3% | 3% | 2% | 1% | 1% | 0% |
| Small Dom Eq | 0% | 100% | 1% | 2% | 2% | 1% | 1% | 0% | 0% | 0% | 0% | -1% |
| International Eq | 0% | 100% | 3% | 3% | 2% | 2% | 2% | 1% | 0% | 0% | -1% | -1% |

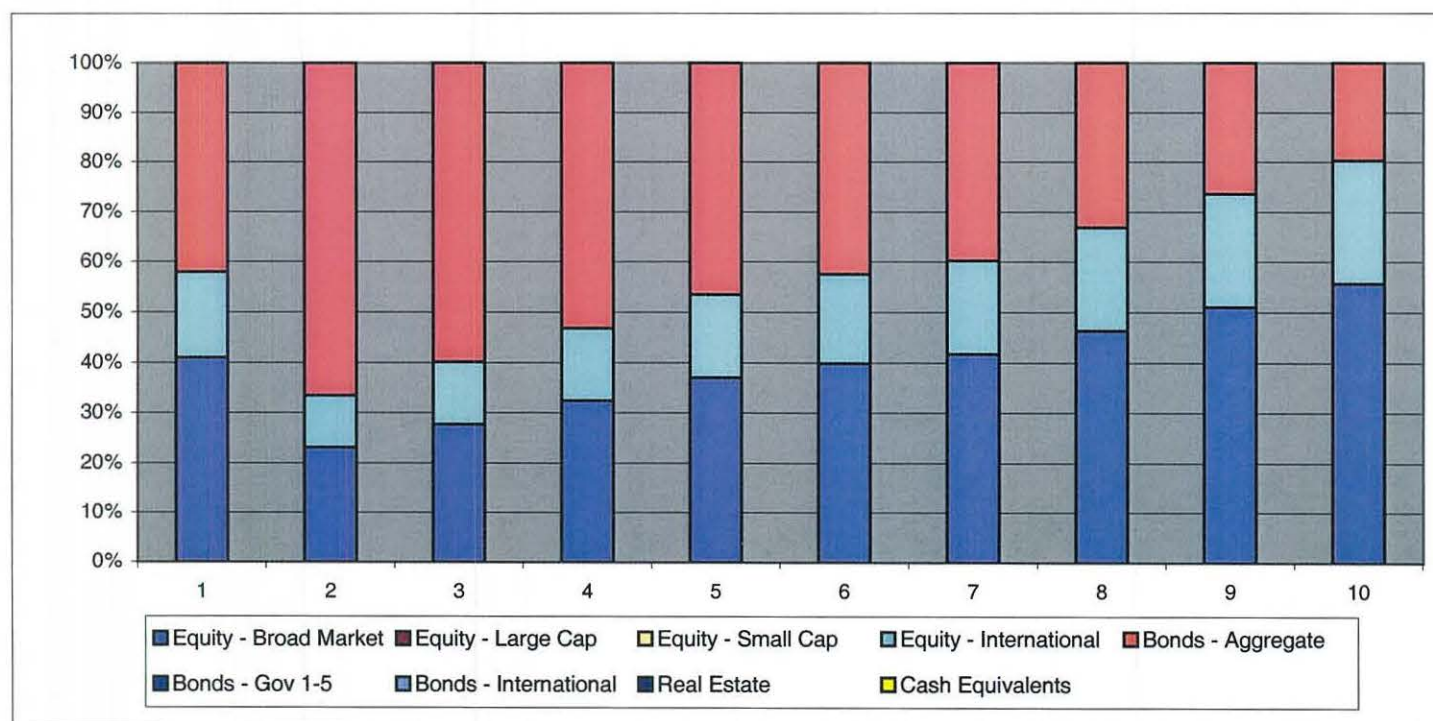
Comparison

Efficient Frontier (Alternative Investments Excluded)



| 2002 Asset Classes | Constraints | | Asset Mix Alternatives | | | | | | | | | |
|------------------------|-------------|------|------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| | Min | Max | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Equity - Broad Market | 0% | 100% | 41.00% | 23.13% | 27.79% | 32.45% | 37.10% | 39.90% | 41.76% | 46.42% | 51.07% | 55.73% |
| Equity - Large Cap | 0% | 0% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| Equity - Small Cap | 0% | 0% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| Equity - International | 0% | 100% | 17.00% | 10.33% | 12.37% | 14.41% | 16.45% | 17.68% | 18.49% | 20.54% | 22.58% | 24.62% |
| Bonds - Aggregate | 0% | 100% | 42.00% | 66.54% | 59.84% | 53.14% | 46.44% | 42.42% | 39.75% | 33.05% | 26.35% | 19.65% |
| Bonds - Gov 1-5 | 0% | 0% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| Bonds - International | 0% | 0% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| Real Estate | 0% | 0% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| Cash Equivalents | 0% | 0% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| Totals | | | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% |

| | | | | | | | | | | |
|----------------------------|---------|--------|--------|--------|---------|---------|---------|---------|---------|---------|
| Target Return | 7.911% | 7.000% | 7.250% | 7.500% | 7.750% | 7.900% | 8.000% | 8.250% | 8.500% | 8.750% |
| Projected Return | 7.911% | 7.000% | 7.250% | 7.500% | 7.750% | 7.900% | 8.000% | 8.250% | 8.500% | 8.750% |
| Projected Risk | 10.879% | 7.479% | 8.349% | 9.275% | 10.240% | 10.834% | 11.235% | 12.253% | 13.288% | 14.336% |
| 1 Yr. Probability of Loss | 23.36% | 17.46% | 19.26% | 20.94% | 22.46% | 23.29% | 23.82% | 25.04% | 26.12% | 27.08% |
| 5 Yr. Probability of Loss | 5.20% | 1.82% | 2.61% | 3.53% | 4.53% | 5.15% | 5.57% | 6.61% | 7.63% | 8.62% |
| 10 Yr. Probability of Loss | 1.07% | 0.15% | 0.30% | 0.53% | 0.83% | 1.06% | 1.22% | 1.66% | 2.15% | 2.68% |



Exxon Valdez Oil Spill Trustee Council

441 W. 5th Ave., Suite 500 • Anchorage, Alaska 99501-2340 • 907/278-8012 • fax 907/276-7178



MEMORANDUM

TO: Trustee Council

FROM: Molly McCammon
Executive Director

DATE: February 19, 2002

RE: Scientific advice

At your December 11, 2001 meeting you reviewed a draft process for developing scientific advice and peer review for the GEM Program. Following that meeting, a working group was established to further develop the details of this process. The working group consisted of the following:

Jeep Rice – NMFS, Auke Bay Lab
Michael Baffrey – USDOJ
Carol Fries – ADNRR
Bill Hauser – ADF&G
Stan Senner – Public Advisory Group
Brett Huber – Public Advisory Group
Hal Batchelder – Executive Director, U.S. GLOBEC NEP Program
Rich Marasco – NMFS, Alaska Science Center
Phil Mundy – EVOS
Molly McCammon - EVOS

The working group met twice by teleconference. While the group did not agree on every minor detail, I believe the attached draft represents the consensus of the group regarding the major elements of the scientific advice process. The Public Advisory Group will be briefed on this draft at their meeting February 21, 2002 and their comments provided to you at your February 25, 2002 meeting.

On the basis of the review done by the working group, I recommend that this draft be adopted by the Trustee Council at the February 25 meeting.

To put the proposed process in perspective, I would like to highlight the differences in the current process and staffing and the proposed process and staffing. The proposed scientific advice process builds upon the Trustee Council's successful record of 13 years of peer-reviewed science.

Under the current process, both programmatic and technical peer review and scientific advice are provided by a group of core peer reviewers, and additional specialists as needed, under the leadership of an independently contracted Chief Scientist. The Chief Scientist reports directly to the Trustee Council.

Under GEM, the scientific advice process would be implemented by Trustee Council staff; a committee structure consisting of a Scientific and Technical Advisory Committee (STAC) and related subcommittees and work groups; and a periodically convened independent review committee, similar to the National Research Council panel reviewing the draft GEM Program. This advice structure would be administered through the Executive Director.

Similar to the current process, scientific advice provided by the proposed STAC and subcommittees for the GEM Program will be viewed as the "rebuttable presumption" for Trustee Council action. In other words, the Trustee Council may be expected to act positively on their recommendations, unless other information is presented to indicate a different action. Other information could come from the Public Advisory Group, other members of the public, and trustee agency staff.

Since the Trustee Council receives information and guidance from a number of sources, the Executive Director would continue to ensure that all advice and reviews are organized and summarized to assist the Council's decision-making. The Executive Director reports directly to the Trustee Council and has the ultimate responsibility for implementing all the Trustee Council's programs, policies and procedures. That responsibility would remain unchanged.

The Executive Director is currently assisted by the Council's Chief Scientist, the Science Coordinator and other staff.

Bob Spies has served the Trustee Council as chief scientist since 1990. As chief scientist, Bob has provided independent advice to the Trustee Council. Although he works closely with a group of five other "core" peer reviewers, he is still the main source of scientific advice for the restoration program. Bob also is leading a group of experts providing a much-needed synthesis of the scientific results of the Trustee Council's projects during damage assessment and restoration. It is appropriate that, as the Trustee Council's programs change with implementation of GEM in FY03, Bob's title and responsibilities also change.

In the proposed process for GEM, Bob would take the new title of Senior Science Advisor for Oil Spill Effects. In this role, he would continue to lead the synthesis project, as well as provide advice to the Trustee Council on direct oil-spill related injury and recovery, including peer review of related project proposals and reports. He would serve as chair of a new Oil Effects Subcommittee under the STAC.

The current Trustee Council Science Coordinator – Phil Mundy – has served as the Council's staff scientist and the chief – or lead – scientist for GEM since 1999. To better reflect the responsibilities of this position, a new title of Science Director is proposed.

The Science Director would assist the Executive Director by 1) providing scientific leadership for the GEM Program; 2) serving as GEM's primary scientific spokesperson and a non-voting permanent co-chair of the STAC; 3) coordinating the scientific committee structure; and 4) ensuring that the GEM Program is implemented with a high standard of scientific excellence. This role is expected to adapt to the changing needs of the growing GEM program.

Under the current process, each trustee agency has a designated liaison who has the responsibility of coordinating their agency's review of draft documents, policies and proposed action items. The liaison's time is compensated by the Trustee Council, with two months time included in the FY 2002 budget. The roles of the agency liaisons will be reviewed and a recommendation made this summer on whether funding in FY 03 and beyond is warranted.

Gulf of Alaska Ecosystem Monitoring and Research Program

Draft Process for Providing Scientific and Technical Advice and Peer Review *February 19, 2002 Draft*

Addendum to Program Management **(GEM Program Document, Volume I, Chapter 6)**

(References to Volume numbers and chapters refer to the August 2001 Draft of the GEM Program Document, available on <http://www.oilspill.state.ak.us/index.html>)

I. DESCRIPTION OF PROCESS FOR SCIENTIFIC ADVICE

The GEM Program is a long-term monitoring and research program, responsive to the needs of resource management agencies, stakeholders and the public, consistent with the program's mission and goals, and held to a high standard of scientific excellence. The process for providing scientific and technical advice includes 1) advice on the program as a whole; 2) advice at the individual project level; and 3) peer review of all proposals and reports.

The GEM scientific advice process builds upon the Trustee Council's successful record of 13 years of peer-reviewed science. This process will be implemented by staff to the *Exxon Valdez* Oil Spill Trustee Council; a committee structure consisting of a Scientific and Technical Advisory Committee (STAC) and related subcommittees and work groups; and a periodically convened independent review committee (see Figure 6.1 below). Programmatic and technical review largely will be separated. This process will be reviewed and refined over time, as experience with program implementation permits better understanding of the Trustee Council's needs for scientific advice under GEM.

Scientific advice provided by the proposed STAC and subcommittees for the GEM Program will be viewed as the "rebuttable presumption" for Trustee Council action. In other words, the Trustee Council may be expected to act positively on their recommendations, unless other information is presented to indicate a different action. The Trustee Council also relies on advice from the Program Advisory Committee, other members of the public, and trustee agency staff. The Executive Director is expected to take this broad spectrum of advice into account when resolving conflicting issues and developing recommendations for Trustee Council consideration.

A. Staff

Since the Trustee Council receives information and guidance from a number of sources, the Council relies on its Executive Director to ensure that all advice and reviews are organized and summarized to assist the Council's decision-making. The Executive Director reports directly to the Trustee Council and has the ultimate responsibility for implementing all the Trustee Council's programs, policies and procedures.

The Executive Director will be assisted by a Senior Science Advisor for Oil Spill Effects, a Science Director and other staff.

The Senior Science Advisor for Oil Spill Effects will provide advice on direct oil-spill related injury and recovery, including peer review of related project proposals and reports. This position will chair the Oil Effects Subcommittee and report the committee's recommendations to the STAC.

The Science Director will assist the Executive Director by 1) providing scientific leadership for the GEM Program; 2) serving as GEM's primary scientific spokesperson and a non-voting permanent co-chair of the STAC; 3) coordinating the scientific committee structure; and 4) ensuring that the GEM Program is implemented with a high standard of scientific excellence. This role is expected to adapt to the changing needs of the growing GEM program.

B. Committee Structure

Scientific and Technical Advisory Committee (STAC). The STAC is a standing committee that is expected to provide the primary scientific advice to the Executive Director on how well the collection of proposed monitoring and research projects (the Work Plan) and the overall GEM Program meet the mission and goals of the Trustee Council (GEM Program Document Vol. I, Chapter 1) and test the adequacy of the GEM conceptual foundation (see Figure 4.3). As needed and appropriate, the STAC may participate in and/or lead the peer review process of proposals and project reports.

Subcommittees. The subcommittees are standing committees organized to address the "nuts and bolts" of developing and implementing projects responsive to the Council's needs, coordinating among scientists and other interested parties, and helping to organize technical peer review of individual proposals.

Work groups. *Ad hoc* work groups are subcommittees temporarily formed to address specific issues. They have a specific purpose and a limited duration.

C. External Review Committee

Periodically (every five to ten years), the Trustee Council will contract with an external entity, such as the National Research Council, to review the entire GEM Program.

II. ESTABLISHING AND MAINTAINING COMMITTEE STRUCTURE

A. Scientific and Technical Advisory Committee (STAC)

Responsibilities

1. The STAC shall meet as often as needed to provide to the Executive Director broad programmatic advice and guidance on the GEM Work Plan with respect to the GEM Program's mission, goals, conceptual foundation, central hypotheses and questions.
2. The STAC shall recommend to the Executive Director projects for the GEM Work Plan best suited to the mission, goals, conceptual foundation, and central hypothesis. A written record of these recommendations shall be presented to the Program Advisory Committee (PAC) and to the Trustee Council.
3. The STAC co-chairs shall brief the PAC and the Council once a year on the state of the GEM program and on other occasions at the request of the Trustee Council, the Executive Director, or the STAC.
4. The STAC, in conjunction with the subcommittees, shall provide leadership in identifying and developing testable hypotheses relevant to the conceptual foundation and central questions of the GEM Strategic Plan, consistent with the GEM Program's mission and goals and the policies of the Trustee Council.
5. The STAC, using recommendations provided by the subcommittees and other means, shall identify and recommend syntheses, models, process studies, and other research activities for the Invitation to Submit Proposals.
6. The STAC shall meet with subcommittee chairs as needed.
7. At least one, but not more than three, of the STAC members shall also serve on the Program Advisory Committee (former Public Advisory Group). The STAC shall select these members.
8. The STAC shall select the subcommittee members, following a process approved by the Trustee Council. The STAC shall receive reports and briefings from the subcommittee chairs as needed.
9. The STAC shall assist Trustee Council staff in identifying peer reviewers, and may, upon request, conduct peer review on individual responses to the Invitation for Proposals and project reports.
10. Subject to funding restrictions and in consultation with the Executive Director, the STAC may convene special review panels or work groups to evaluate and make recommendations about aspects of the GEM program, or to meet with project investigators and others to fully explore particular projects or issues.

Membership

1. The STAC shall have seven members: six voting members appointed by the Trustee Council with the advice of the independent nominating committee and the Trustee Council's GEM Science Director as the seventh member who serves as permanent non-voting co-chair.
2. The STAC members shall be drawn from the scientific sectors of academic, government, NGO, and private institutions. Together the members shall possess expertise in the habitats, species and environments of the Alaska Coastal Current and offshore, the intertidal and subtidal (nearshore), the watersheds, modeling, resource management, human activities and their potential ecological impacts, and community-based science programs.
3. The STAC members shall be selected for their expertise, broad perspective, long experience and leadership in areas important to the GEM Program.

4. 4.STAC members cannot be principal investigators for presently funded or ongoing GEM projects.
5. The STAC members shall serve terms of four years, renewable once at the option of the Trustee Council, except during the first two years of the program when three members shall serve initial terms of two years, renewable for a full four year term. All renewals for a second term are at the option of the Trustee Council.
6. After serving on the STAC, a person is not eligible to serve again on the STAC for two years, with the exception of a person who was appointed from the list of alternates to complete a partial term. A person appointed as an alternate is eligible to be nominated to an open membership slot to serve a full term, and may, if serving less than two years and at the discretion of the Trustee Council, also be eligible for renewal.
7. In the event of a vacancy prior to the end of a term, the Trustee Council shall appoint a replacement from among the list of alternates. Inactive members may be removed by the Trustee Council from the STAC membership.

Rules of Procedure

1. The STAC shall elect a co-chair by majority vote at least once every two years. The Science Director shall serve as the other co-chair.
2. Matters that cannot be resolved by consensus shall be decided by four affirmative votes of the STAC membership.
3. The STAC shall develop procedures for interfacing with the subcommittees, work groups and the Program Advisory Committee.

B. Subcommittees

Responsibilities

1. Subcommittees shall provide guidance within each habitat type to the STAC and to the Trustee Council staff regarding testable hypotheses and other topics for consideration in future Invitations to Submit Proposals.
2. Subcommittees shall identify implementation strategies and possible locations for measuring monitoring variables that are relevant to the key questions and testable hypotheses.
3. Subcommittees shall, upon request, help organize the peer review on proposals and project reports in their broad habitat types, including recommending appropriate peer reviewers.
4. Initially, the subcommittees shall be organized along the lines of the four primary habitat types: offshore, Alaska Coastal Current, nearshore and watersheds, with additional subcommittees for oil effects and data management. The subcommittee structure may change following further review and discussion (and pending final NRC review).
5. Subject to funding restrictions, subcommittees may convene special review panels from time to time to evaluate and make recommendations about aspects of the GEM

program. At other times, special panels may meet with project investigators and others to fully explore particular topics, problems, or projects.

6. A subcommittee may notify the STAC when it encounters the need for a work group.

Membership

1. Subcommittees are composed of at least 5 and not more than 8 individuals: scientists, resource managers, and/or other experts selected by the STAC primarily for their disciplinary expertise and familiarity with a broad habitat type (watersheds, intertidal and subtidal, ACC, or offshore). Other criteria include institutional and professional affiliations in order to promote collaboration and cooperation.
2. Subcommittee members serve three year renewable terms.
3. Subcommittee members may include principal investigators of GEM projects.
4. Nominees who agreed to serve, but were not selected by the STAC, may serve as peer reviewers and recommend peer reviewers, and are automatically considered as nominees to fill vacancies on subcommittees.

Rules of Procedure

1. Subcommittees shall elect their own chairs, usually in a person's third year on the committee.
2. Matters that cannot be resolved by consensus shall be decided by majority vote of the membership.

C. Work Groups

Responsibilities

1. Work Groups shall recommend to the STAC or a subcommittee courses of action on the task for which the work group has been established. Tasks may include developing strategies to implement specific monitoring and research goals.
2. Work Groups may help organize the peer review on proposals submitted to address the task for which the work group has been established.

Membership

1. Any number of individuals may be appointed to work groups established by the Executive Director at the request of the STAC. Expertise will depend on the issue to be addressed.
2. Members are approved by the Executive Director from nominees submitted by the STAC or subcommittee that identified the need for the work group.
3. Work groups are expected to be issue specific and of a limited duration specified by the Executive Director at its inception.

Rules of Procedure

1. Work groups shall elect a chair by majority vote.
2. Matters that cannot be resolved by consensus shall be decided by majority vote of the membership.

III. SELECTING COMMITTEE MEMBERS

A. Selection Process for STAC

1. The Executive Director shall issue a public call for nominations to serve on the STAC. The call will identify the types of expertise and the qualifications the Trustee Council desires to see for the nominees. Any person (including oneself) or organization is free to make a nomination.
2. Those nominating a person – or the person being nominated -- will be asked to submit a one-page synopsis of the nominee's qualifications to the Executive Director.
3. At the request of the Executive Director, a Nominating Committee will convene to develop a recommended list of persons fitting STAC membership criteria. The Nominating Committee shall recommend to the Executive Director a nominee for each vacant seat on the STAC, after determining that each is willing to serve on the STAC. Remaining nominees who are willing to serve may become alternates. The list of nominees and alternates shall be forwarded to the Trustee Council by the Executive Director.
4. The Nominating Committee may suggest names of persons not nominated if there are gaps in desired expertise among the nominees provided to it by the process (i.e., nominating committee members may also make their own nominations).

STAC Nominating Committee

Responsibilities

1. The STAC Nominating Committee shall review nominations for the STAC; if necessary, it may solicit additional nominations at its discretion.
2. The nominating committee shall provide the Executive Director a list of preferred and alternate nominees for appointment to the STAC.
3. The Nominating Committee chair shall brief the Trustee Council on its recommendations.

Membership

1. The STAC Nominating Committee shall be composed of seven members who are familiar with the development and operation of regional monitoring programs similar to GEM.
2. Nominating Committee members may not currently be receiving funding from the Trustee Council, nor may they be closely associated with, or dependent on, those who are funded by the Trustee Council. For example, the Nominating Committee

members may not be funded investigators within the EVOS/GEM program, nor may nominating committee members be the immediate supervisors or supervisees of currently funded investigators, or members of their immediate family.

3. At least five Nominating Committee members shall reside in Alaska. STAC nominees and current STAC members may not serve on the Nominating Committee.
4. Nominating Committee members shall be selected by the Executive Director in consultation with the Trustee Council. The Executive Director shall also determine the life of the Nominating Committee.

Rules of procedure

1. The Nominating Committee shall elect a chairperson by majority vote to conduct the meetings.
2. The Nominating Committee shall establish a schedule and a process for developing a recommended list of nominees for the STAC that is consistent with applicable state and federal statutes, particularly with regard to Equal Employment Opportunity principles and diversity considerations.
3. The Executive Director shall provide assistance as requested by the Nominating Committee chair.

B. Selection Process for Subcommittee Members

1. The Executive Director shall issue public calls for nominations to the subcommittees. The announcements shall list desirable qualifications and other nominating criteria.
2. The STAC shall review the nominees and make recommendations to the Trustee Council for approval.

C. Selection Process for Work Group Members

1. The Executive Director shall approve work group members upon the recommendation of the STAC and/or subcommittees.

IV. PEER REVIEW

Each project proposal, as well as some annual and all final reports, will be peer-reviewed by appropriate experts who are not competing for funding from the GEM program in the same competition, as a rule, are not also conducting projects funded by the Trustee Council. The external peer review process will provide a rigorous critique of the scientific merits of proposals and reports. The goals of the review process are to ensure that studies sponsored by the Trustee Council 1) adhere to a high standard of scientific excellence; 2) have scientific objectives that are relevant and consistent with the GEM Program's conceptual foundation, central questions, and testable hypotheses; and 3) use valid methods that will allow them to achieve these objectives. The peer review may be either paid or volunteer, or some combination, whichever is most expeditious and appropriate. Reviews and recommendations shall be documented in writing.

The STAC or subcommittees may convene work groups from time to time to evaluate and make recommendations about aspects of the GEM program. These may include special peer review panels that would meet with project investigators and others to fully explore particular topics, problems, or projects.

A framework for peer review shall be developed by Trustee Council staff and include the following:

- A clear statement of the purposes of the peer review
- The role of the peer reviewer
- Guidelines for achieving and maintaining impartiality

The Science Director is responsible to the Executive Director and the Trustee Council for maintaining independence and the appropriate level of expertise for each peer review activity, training of peer reviewers in established procedures, and establishing an honorarium (payment) process for peer reviewers when necessary to accomplish the needed peer review.

Figures follow on two pages

Figure 4.3 Selecting monitoring elements starts with the mission and goals established by the Trustee Council, as expressed in the conceptual foundation, which is regularly updated by new information from a variety of sources. GEM Program Document, Vol. I, Chapter 4, page 38.

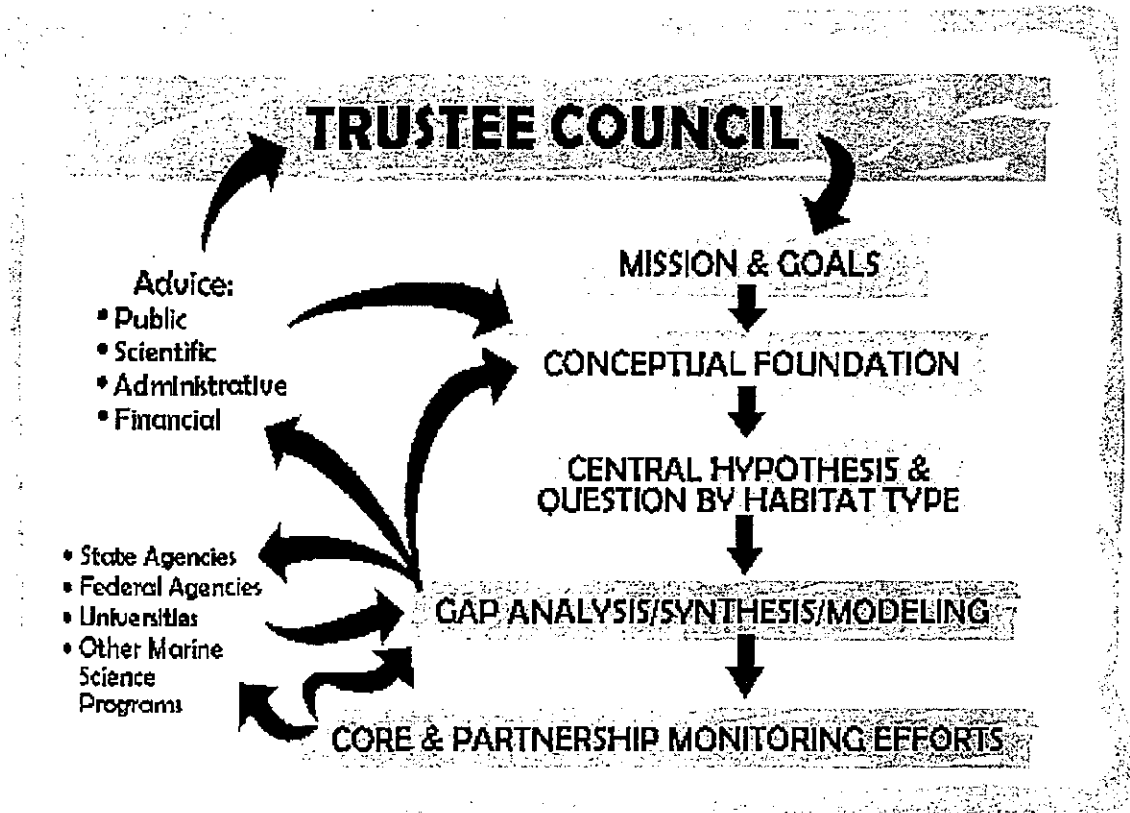
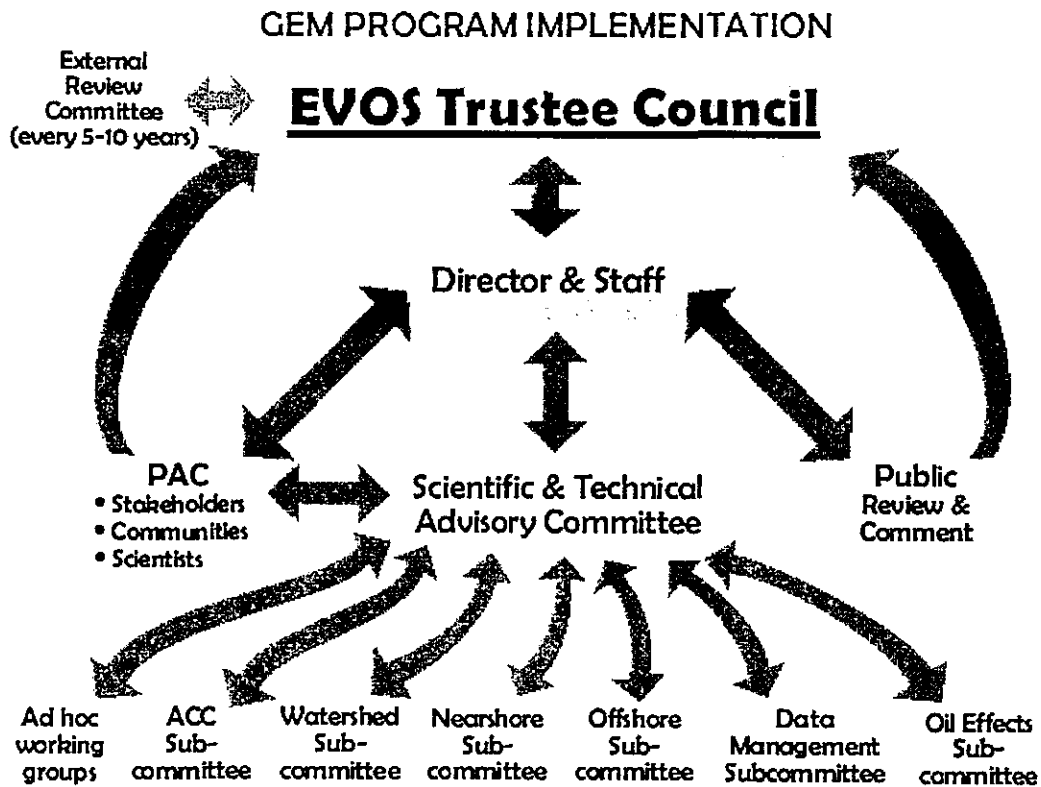


Figure 6.1. The organizational elements involved in GEM implementation. Modified in response to comments from the NRC, after GEM Program Document, Vol. I, Chapter 6, page 66.



Project 02630

Designation of funding recipient (PICES)

Exxon Valdez Oil Spill Trustee Council

441 W. 5th Ave., Suite 500 • Anchorage, Alaska 99501-2340 • 907/278-8012 • fax 907/276-7178



MEMORANDUM

TO: Trustee Council

FROM: Molly McCarron
Executive Director

SUBJ: Support for PICES

DATE: February 6, 2002

At the December 11, 2001 meeting, the Trustee Council approved an additional \$240,900 for Project 02630, GEM Planning (\$63,800 was approved in August). Included in the amount approved in December was \$50,000 with \$45,000 for external meeting support for PICES, Oceans & Watersheds Symposium, and other meetings and \$5,000 for internal meeting support costs, such as rental space, printing, etc. It was our intention that \$14,000 of the \$45,000 would be given to PICES to help with travel expenses for a North Pacific monitoring meeting in April and with publication of a new state of the oceans report for the North Pacific. We have explored various options for getting these funds to PICES, and it appears that the most expeditious is a "named recipient" contract. PICES is the only international scientific marine research organization for the North Pacific. As such, it is appropriate that it be the entity planning a coordinated monitoring effort for the North Pacific and a state of the oceans report for the North Pacific.

Proposed Trustee Council Motion: Trustee Council approves that \$14,000 of Project 02630 (Restoration Office portion) contractual costs be given to PICES for travel and report expenses.

Project 02630

Additional funds for water quality planning workshop

**Documentation to be made available at the Trustee Council
meeting**

STATE OF ALASKA

DEPT. OF ENVIRONMENTAL CONSERVATION COMMISSIONER'S OFFICE

TONY KNOWLES, GOVERNOR

410 Willoughby Avenue
Juneau, AK 99801
PHONE: (907) 465-5066
FAX: (907) 465-5070
<http://www.state.ak.us/dec/>

February 22, 2002

Molly McCammon, Executive Director
Exxon Valdez Oil Spill Trustee Council
441 W. 5th Avenue Suite 500
Anchorage, AK 99501-2340

Dear Ms. McCammon:

Re: Project 02630 Amendment, Surface Water Quality Monitoring

The Department of Environmental Conservation (DEC), Division of Air and Water Quality is beginning development of a surface water quality monitoring strategy for the State of Alaska. Development of a strategy is essential for implementation of Alaska Clean Water Action (ACWA) objectives to:

- Assess the effectiveness and gaps in Alaska's water stewardship;
- Assess the health of Alaska's surface and ground waters; and
- Direct funding towards data collection to protect, restore, or recover the valued uses of waters that are at risk or polluted.

DEC intends to work closely with interested individuals, government, tribal, for profit, and non-profit institutions in developing a surface water quality monitoring strategy. A key element of the monitoring strategy will be to develop linkages to regional environmental monitoring programs such as the Gulf Ecosystem Monitoring Program (GEM) and Southeast Sustainable Salmon to facilitate the implementation of field projects which meet multiple monitoring objectives.

DEC is requesting a total of \$16,100 be added to the GEM planning budget (Project 02630) to enable DEC to contract for assistance in developing background information for public meetings to involve stakeholders in development of a surface water monitoring strategy. DEC will task a term contractor with developing a report that summarizes surface water quality monitoring strategies that other states have developed and the approaches they use to fund their surface water quality monitoring programs. Information will be made available to assist DEC and stakeholders in identifying strategies which may have utility for Alaska. The contract final report will be due from the contractor prior to the end of State Fiscal Year 2002.

Sincerely,



Michele Brown
Commissioner

FY 02 EXXON VALDEZ TRUSTEE COUNCIL PROJECT BUDGET

October 1, 2003 - September 30, 2002

| Budget Category: | Authorized FY 01 | Proposed FY 02 | | | | | | |
|-----------------------------|---------------------|-------------------|---|--|--|--|--|--|
| Personnel | | \$0.0 | | | | | | |
| Travel | | \$0.0 | | | | | | |
| Contractual | | \$15.0 | | | | | | |
| Commodities | | \$0.0 | | | | | | |
| Equipment | | \$0.0 | LONG RANGE FUNDING REQUIREMENTS | | | | | |
| Subtotal | \$0.0 | \$15.0 | Estimated | | | | | |
| General Administration | | \$1.1 | FY 03 | | | | | |
| Project Total | \$0.0 | \$16.1 | | | | | | |
| Full-time Equivalents (FTE) | | 0.0 | | | | | | |
| Other Resources | | | Dollar amounts are shown in thousands of dollars. | | | | | |

The Department of Environmental Conservation, Division of Air and Water Quality (DEC) is beginning development of a surface water quality monitoring strategy for the State of Alaska. Development of a strategy is essential for implementation of Alaska Clean Water Action (ACWA) objectives to:

- ? Assess the effectiveness and gaps in Alaska's water stewardship;
- ? Assess the health of Alaska's surface and ground waters; and
- ? Direct funding towards data collection to protect, restore, or recover the valued uses of waters that are at risk or polluted.

DEC intends to work closely with interested individuals, government, tribal, for profit, and non-profit institutions in developing a surface water quality monitoring strategy. A key element of the monitoring strategy will be to develop linkages to regional environmental monitoring programs such as the Gulf Ecosystem Monitoring Program and Southeast Sustainable Salmon to facilitate the implementation of field projects which meet multiple monitoring objectives.

DEC is requesting a total of \$16,100 be added to the GEM planning budget (Project 02630) to enable DEC to contract for assistance in developing background information for public meeting.

FY02

Project Number: 02630-AMENDMENT
Project Title: Planning for GEM
Agency: ADEC

FORM 3A
TRUSTEE
AGENCY
SUMMARY

Prepared:

FY 02 EXXON VALDEZ TRUSTEE COUNCIL PROJECT BUDGET

October 1, 2003 - September 30, 2002

| Personnel Costs: | | GS/Range/ Step | Months Budgeted | Monthly Costs | Overtime | Proposed FY 02 |
|------------------|----------------------|-------------------|--------------------|------------------|----------|-------------------|
| Name | Position Description | | | | | |
| | | | | | | 0.0 |
| | | | | | | 0.0 |
| | | | | | | 0.0 |
| | | | | | | 0.0 |
| | | | | | | 0.0 |
| | | | | | | 0.0 |
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| | | | | | | 0.0 |
| | | | | | | 0.0 |
| | | | | | | 0.0 |
| | | | | | | 0.0 |
| Subtotal | | | 0.0 | 0.0 | 0.0 | |
| Personnel Total | | | | | | \$0.0 |

| Travel Costs: | | Ticket Price | Round Trips | Total Days | Daily Per Diem | Proposed FY 02 |
|---------------|--|-----------------|----------------|---------------|-------------------|-------------------|
| Description | | | | | | |
| | | | | | | 0.0 |
| | | | | | | 0.0 |
| | | | | | | 0.0 |
| | | | | | | 0.0 |
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| | | | | | | 0.0 |
| | | | | | | 0.0 |
| | | | | | | 0.0 |
| Travel Total | | | | | | \$0.0 |

FY02

Prepared:

Project Number: 02630-AMENDMENT
 Project Title: GEM Planning
 Agency: ADEC

FORM 3B
 Personnel
 & Travel
 DETAIL

FY 02 EXXON VALDEZ TRUSTEE COUNCIL PROJECT BUDGET

October 1, 2003 - September 30, 2002

| | | |
|---|--|----------|
| Contractual Costs: | | Proposed |
| Description | | FY 02 |
| Contract to develop a report that summarizes surface water quality monitoring strategies that other states have developed and the approaches they use to fund their surface water quality monitoring programs | | 15.0 |
| When a non-trustee organization is used, the form 4A is required. | | |
| Contractual Total | | \$15.0 |
| Commodities Costs: | | Proposed |
| Description | | FY 02 |
| | | |
| Commodities Total | | \$0.0 |

FY02

Prepared:

Project Number: 02630-AMENDMENT
 Project Title: GEM Planning
 Agency: ADEC

FORM 3B
 Contractual &
 Commodities
 DETAIL

October 1, 2003 - September 30, 2002

| | | |
|--|--|--|
| <div data-bbox="151 1246 265 1266"> FY02 </div> | <div data-bbox="499 1223 1060 1241"> Project Number: 02630-AMENDMENT Project Title: GEM Planning Agency: ADEC </div> | <div data-bbox="1653 1223 1815 1241"> FORM 3B Equipment DETAIL </div> |
|--|--|--|

Projects
01423, 00163, 00159

**Approval of bonus awards as
allowable project costs**

Exxon Valdez Oil Spill Trustee Council

441 W. 5th Ave., Suite 500 • Anchorage, Alaska 99501-2340 • 907/278-8012 • fax 907/276-7178



MEMORANDUM

TO: Trustee Council

FROM: Molly McCammon
Executive Director

DATE: February 14, 2002

RE: Unallowable Project Costs - Bonuses

As a result of the Fiscal Year 2000 audit, it was noted that U.S. Fish and Wildlife Service had presented bonus awards to personnel (\$5,000 from project 00159 and \$2,500 from project 00163). While these awards were in compliance with U.S. Fish and Wildlife Service policy, the awards were not in compliance with Trustee Council Operating Procedures as allowable costs within project budgets.

As a result of the Fiscal Year 2001 audit, it will be noted that the U.S. Geological Survey (DOI) presented bonus awards to personnel (a total of \$2,796 from project 01423). Again, while these awards were in compliance with U.S. Geological Survey policy, the awards were not in compliance with Trustee Council Operating Procedures as allowable costs within the project budget.

Based on these audit results, it is apparent that the Trustee Council needs to develop a policy on bonus award payments. If bonuses are allowable project costs, the Trustee Council Operating Procedures need to be modified to allow bonuses under appropriate circumstances.

Budgeting for bonuses presents several potential problems. It is difficult, if not impossible, to predict when a person will go "above and beyond the call of duty". If the budget contains funding for an award, how does one deal with an employee who does not deserve an award?

When comparing equal Federal and State employees, it should be noted that the Federal pay scale is higher than the State's. The following differences and similarities between the Federal and State government pay scales also need to be considered:

| Various Types of Pay | Federal | State | Notes |
|----------------------|---------|-------|--|
| Hazard Pay | Yes | Yes | State personnel can get both sea duty and hazard pay if the appropriate detailed criteria are met. |
| Sea Duty | No | Yes | State personnel can get both sea duty and hazard pay if the appropriate detailed criteria are met. |
| Overtime | Yes | Yes | |
| Comp Time | Yes | Yes | |
| Bonuses | Yes | No | The State cannot pay bonuses. |

When comparing the various types of pay (hazard, sea duty, overtime, and comp time), the governments appear to be fairly equal with the exception that the Federal government has a higher base of pay, and under specific criteria, the State can pay both hazard and sea duty pay. The Federal government also has mechanisms for awarding exceptional accomplishments, whereas the State government does not.

Recommended Action: I recommend that the Trustee Council approve payment of the 2000 and 2001 bonus awards as allowable project costs. For Fiscal Year 2002 and beyond, a recommended policy will be developed and included in a comprehensive package of revised Operating Procedures that will come before the Trustee Council for action in August 2002.

Proposed Trustee Council Motion: Trustee Council approves that the bonus awards given in Fiscal Year 2000 and 2001 by the U.S. Fish and Wildlife Service and the U.S. Geological Survey are considered allowable project expenses.

DRAFT

**RESOLUTION OF THE
EXXON VALDEZ OIL SPILL TRUSTEE COUNCIL
REGARDING KEN 309**

We, the undersigned, duly authorized members of the *Exxon Valdez* Oil Spill Trustee Council ("Council"), after extensive review and after consideration of the views of the public, find as follows:

1. The Conservation Fund has purchased the Ninilchik small parcel, KEN 309, in anticipation that it will sell the parcel to the State of Alaska for \$113,000;
2. An appraisal of the parcel approved by the federal review appraiser determined that the fair market value of the parcel is \$113,000;
3. As set forth in Attachment A, Restoration Benefits Report for KEN 309, if acquired, this small parcel has attributes which will restore, replace, enhance and rehabilitate injured natural resources and the services provided by those natural resources, including important habitat for several species of fish and wildlife for which significant injury resulting from the spill has been documented. Acquisition of this small parcel will assure protection of approximately 4.2 acres including approximately 800 feet of linear shoreline along each bank of the Ninilchik River. The parcel supports a popular king salmon fishery each spring and Dolly Varden, silver salmon and steelhead fisheries later in the season. In addition, harlequin ducks, mergansers, mink, otter, black and brown bears, and moose utilize this area as well. The parcel is important to the sport fishing and tourism industries, both of which were impacted by the *Exxon Valdez* Oil Spill ("EVOS").
4. Existing laws and regulations, including but not limited to the Alaska Forest Practices Act, the Alaska Anadromous Fish Protection Act, the Clean Water Act, the Alaska Coastal

Management Act, the Bald Eagle Protection Act and the Marine Mammal Protection Act, are intended, under normal circumstances, to protect resources from serious adverse effects from activities on the lands. However, restoration, replacement and enhancement of resources injured by the EVOS present a unique situation. Without passing judgment on the adequacy or inadequacy of existing law and regulations to protect resources, scientists and other resource specialists agree that, in their best professional judgment, protection of habitat in the spill area to levels above and beyond that provided by existing laws and regulations will have a beneficial effect on recovery of injured resources and lost or diminished services provided by these resources;

5. There has been widespread public support for the acquisition of lands within Alaska as well as on a national basis;

6. The purchase of this parcel is an appropriate means to restore a portion of the injured resources and services in the oil spill area. Acquisition of this parcel is consistent with the Final Restoration Plan.

THEREFORE, we resolve to provide funds for the State of Alaska to purchase all the seller's rights and interests in the small parcel KEN 309 and to provide funds necessary for closing costs recommended by the Executive Director of the Trustee Council ("Executive Director") and approved by the Trustee Council and pursuant to the following conditions:

(a) the amount of funds (hereinafter referred to as the "Purchase Price") to be provided by the Trustee Council to the State of Alaska shall be one hundred thirteen thousand dollars (\$113,000) for small parcel KEN 309;

(b) authorization for funding for any acquisition described in the foregoing paragraph shall terminate if a purchase agreement is not executed by September 30, 2002;

(c) filing by the United States Department of Justice and the Alaska Department of Law of a notice, as required by the Third Amended Order for Deposit and Transfer of Settlement Proceeds, of the proposed expenditure with the United States District Court for the District of Alaska and, if necessary, with the Investment Fund established by the Trustee Council within the Alaska Department of Revenue, Division of the Treasury ("Investment Fund") and transfer of the necessary monies from the appropriate account designated by the Executive Director;

(d) a title search satisfactory to the State of Alaska and the United States is completed, and the seller is willing and able to convey fee simple title by warranty deed;

(e) no timber harvesting, road development or any alteration of the land will be initiated on the land without the express agreement of the State of Alaska and the United States prior to purchase;

(f) a hazardous materials survey satisfactory to the State of Alaska and United States is completed;

(g) compliance with the National Environmental Policy Act; and

(h) a conservation easement on parcel KEN 309 shall be conveyed to the United States which must be satisfactory in form and substance to the United States and the State of Alaska Department of Law.

It is the intent of the Trustee Council that the above referenced conservation easement will provide that any facilities or other development on the foregoing small parcel shall be of limited impact and in keeping with the goals of restoration, that there shall be no commercial use except as may be consistent with applicable state or federal law and the goals of restoration to prepill conditions of any natural resource injured, lost, or destroyed as a result of the EVOS, and the

services provided by that resource or replacement or substitution for the injured, lost or destroyed resources and affected services, as described in the Memorandum of Agreement and Consent Decree between the United States and the State of Alaska entered August 28, 1991 and the Restoration Plan as approved by the Trustee Council.

By unanimous consent, following execution of the purchase agreement between the seller and the State of Alaska and written notice from the Executive Director that the terms and conditions set forth herein and in the purchase agreement have been satisfied, we request the Alaska Department of Law and the Assistant Attorney General of the Environment and Natural Resources Division of the United States Department of Justice to take such steps as may be necessary for withdrawal of the Purchase Price for the above-referenced parcel from the appropriate account designated by the Executive Director.

Such amount represents the only amount due under this resolution to the sellers by the State of Alaska to be funded from the joint settlement funds, and no additional amounts or interest are herein authorized to be paid to the sellers from such joint funds.

Approved by the Council at its meeting of February 25, 2002 held in Anchorage, Alaska, as affirmed by our signatures affixed below:

DAVE GIBBONS
Forest Supervisor
Forest Service Alaska Region
US Department of Agriculture

CRAIG TILLERY
Assistant Attorney General
State of Alaska

DRUE PEARCE
Senior Advisor to the Secretary
for Alaskan Affairs
U.S. Department of the Interior

JAMES BALSIGER
Administrator, Alaska Region
National Marine Fisheries Service

FRANK RUE
Commissioner
Alaska Department of
Fish and Game

MICHELE BROWN
Commissioner
Alaska Department of
Environmental Conservation

Attachment A - Restoration Benefits Report

Attachment A

Resolution 02-05 Small parcel – KEN 309

KEN 309: Icicle Seafoods

Acreage: 4.17 acres, 18 lots

Sponsor: ADNRR & ADF&G

Appraised Value: \$113,000

Owner: The Conservation Fund (former owner Icicle Seafoods, Inc.)

Location: Mission Avenue, near intersection with Sterling Highway, Ninilchik, AK.

Legal Description: Lots 1 - 11, 15 - 19, 21 & 22, Block 8, Ninilchik Townsite.

Parcel Description. This collection of small parcels, including 18 platted lots, is downstream and immediately adjacent to a large parcel owned by the Alaska Department of Fish and Game. The ADF&G parcel is located mostly on the downstream side of the Sterling Highway bridge. These lots border, or are near the Ninilchik River, one of south central Alaska's most important sportfishing rivers. These lots are part of the original Ninilchik Townsite subdivision, with roads and lots platted with no logical relationship to the terrain. Some small lots within this batch of parcels straddle the Ninilchik River, or may be nearly entirely occupied by the river, while the platted roads do not have any logical possibility for reasonable construction without extensive fill and bridge construction. The parcel is subject to periodic flooding during high water events such as fall rainstorms, and is generally wet and brushy. The parcel contains approximately 1,600 linear feet of shoreline.

The lands are characterized by their river valley riparian habitat, with willows, scattered spruce and small cottonwoods and other floodplain vegetation. Wildlife species that commonly use this area include harlequin ducks, mergansers, mink, otter, black and brown bears, and moose. This is an important winter feeding area for moose and often 8-12 moose can be counted in or near the subject property on a winter day. During the early summer, harlequin ducks are commonly viewed in the downstream portion of this property, and the other wildlife species can be seen occasionally throughout the year.

Restoration Benefits. The public has used this area of the Ninilchik River for decades, while pursuing the popular king salmon fishery each spring, and later in the season for Dolly Varden, silver salmon and steelhead angling. Although private land, the landowners have never posted this land and most anglers are not aware that the land is not publicly owned. Anglers primarily access this parcel on foot, following traditional fishing access trails along the river banks. There is no development on the land at this time.

The Ninilchik River supports an enhanced hatchery-supported and native run of king salmon, providing outstanding sport fishing opportunities for anglers. It is one of the finest bank-accessible sport fisheries for king salmon on the Kenai Peninsula, and is extremely popular and productive. The area owned by Icicle Seafoods supports a great deal of the angler activity on this river as the fishing is particularly productive here.

Support of the sportfishing industry is the most important basis of the Ninilchik community's economy. A large number of businesses cater to anglers, and include B &

B's, lodges, restaurants and cafes, taxidermy shops and other retail businesses. These businesses depend upon having predictable fishing destinations available for prospective clients and customers. The Icicle Seafood parcel provides one of the important destinations that support the area's tourism economy.

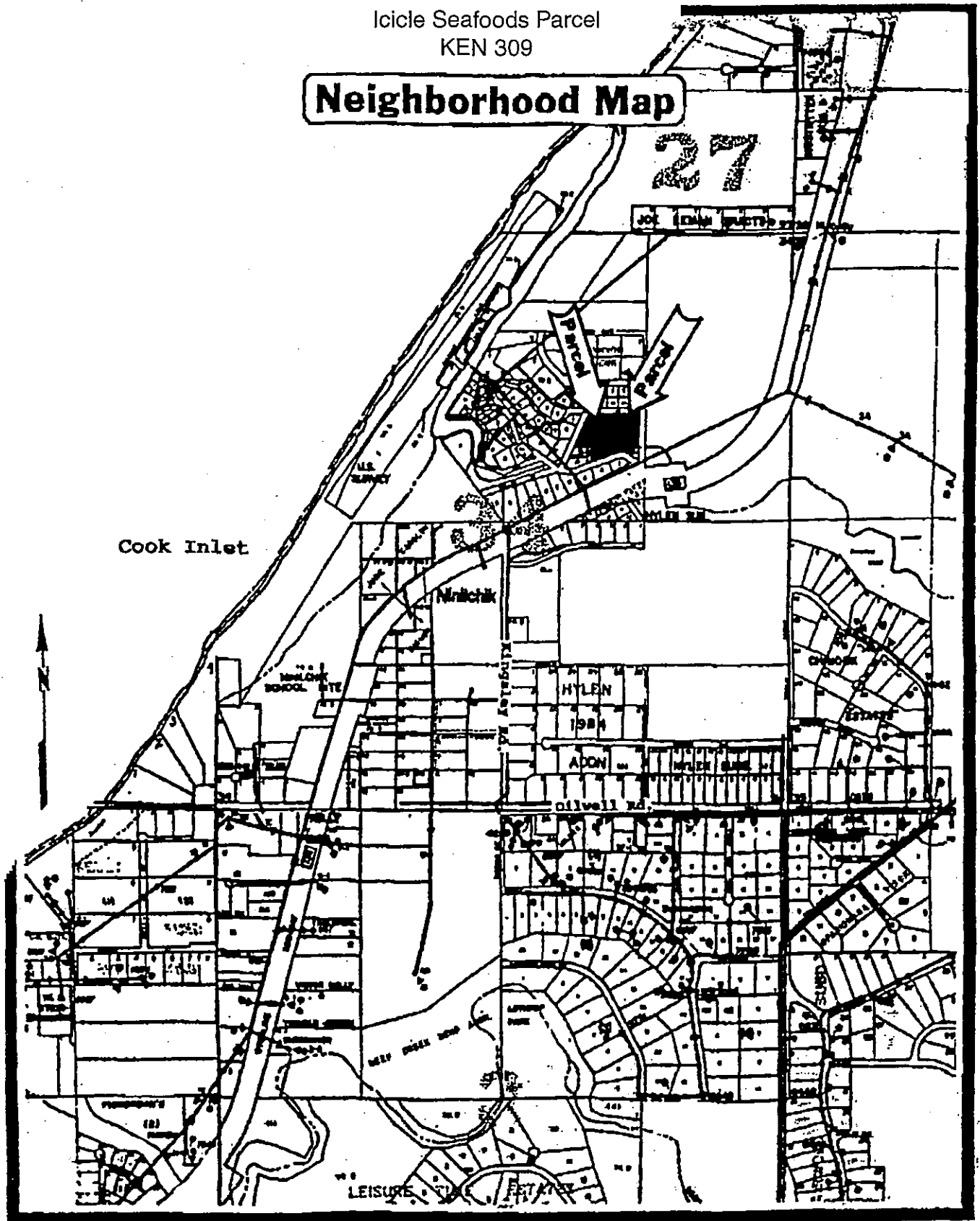
Should the parcels be sold as individual lots or as a bulk sale to another private property owner, the public could lose forever one of Alaska's premier king salmon sportfishing locations. The loss of access to the public would be significant enough, but a sale would also mean that a sensitive riparian section of the Ninilchik River would be subject to development pressures. This could result in the deterioration of important riparian fish habitat, loss of important winter moose feeding habitat, loss of harlequin duck nesting and rearing habitat. Social conflicts with the new owners and anglers wishing to continue to fish traditional fishing holes would emerge and tax local and state government. Acquisition of this parcel would protect approximately 1,600 linear feet of shoreline, important riparian habitat.

Appraised Value. \$113,000, sold as a single cash transaction.

Proposed Management. ADF&G will manage the parcel in a manner consistent with its management of the adjacent parcel and will maintain public access to the river and protect riparian habitat.

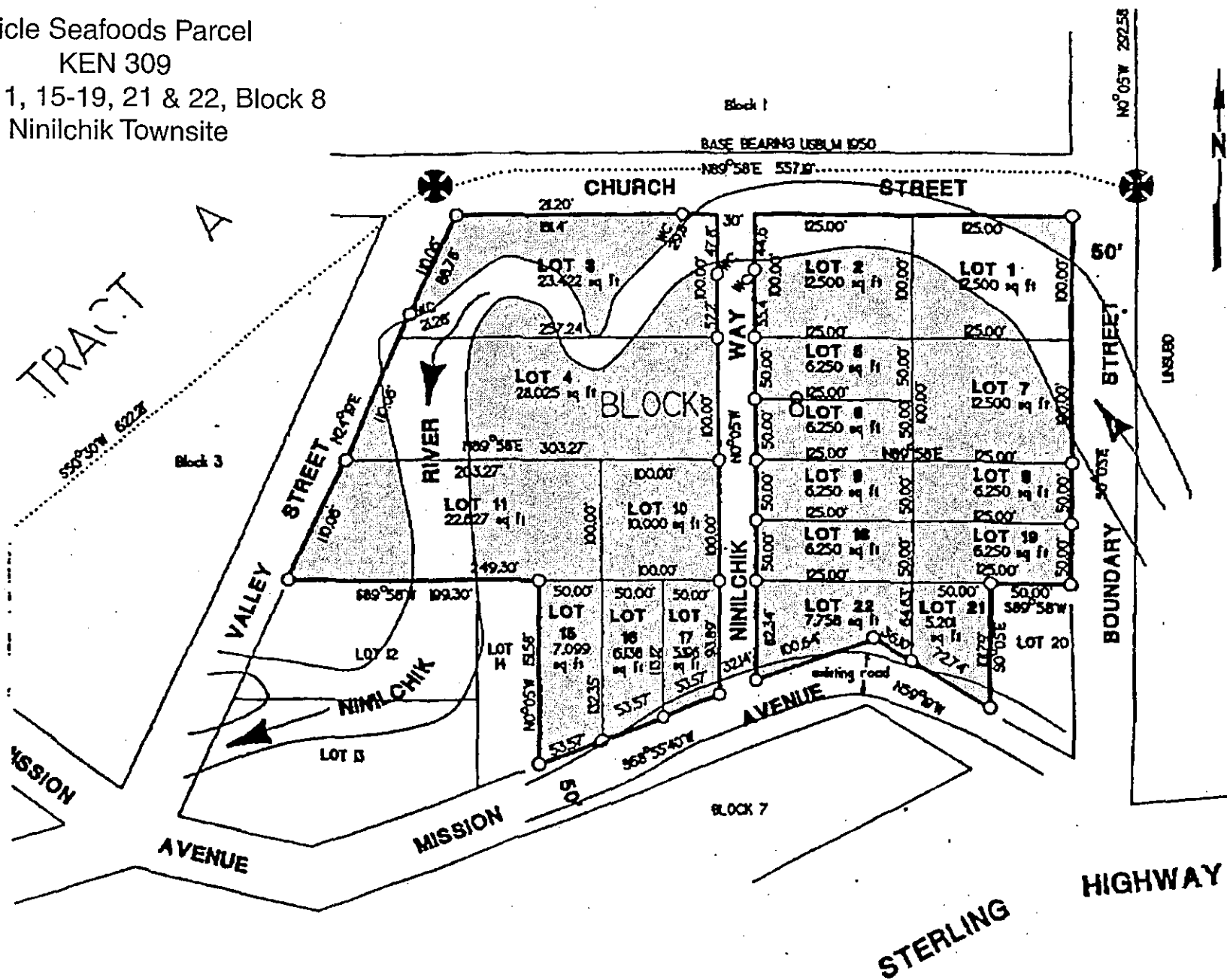
Icicle Seafoods Parcel
KEN 309

Neighborhood Map



KEN 309

Lots 1-11, 15-19, 21 & 22, Block 8
Ninilchik Townsite



**RESOLUTION OF THE
EXXON VALDEZ OIL SPILL TRUSTEE COUNCIL
REGARDING KAP 285**

DRAFT

We, the undersigned, duly authorized members of the *Exxon Valdez* Oil Spill Trustee Council ("Trustee Council"), after extensive review and after consideration of the views of the public, find as follows:

1.a. In its motion of July 5, 2000, the Trustee Council agreed to provide funding for an appraisal of a Native allotment in Hook Bay, Alaska Peninsula National Wildlife Refuge, Parcel KAP 285 (Roderick Carlson);

b. In furtherance of the motion set forth in Paragraph 1.a., and subject to funding by the Trustee Council, the owner of the Native Allotment KAP 285, has agreed to sell his allotment, hereinafter referred to as the parcel;

c. The appraisal for parcel KAP 285 (\$120,000) has been approved by the federal review appraiser;

d. As set forth in Attachment A, if acquired, this parcel has attributes which will restore, replace, enhance and rehabilitate injured natural resources and the services provided by those natural resources, including providing habitat for bird species for which significant injury resulting from the spill has been documented, providing key marine access for subsistence and recreational uses on the surrounding public lands;

2. Existing laws and regulations, including but not limited to the Alaska Forest Practices Act, the Anadromous Fish Protection Act, the Clean Water Act, the Alaska Coastal Management Act, the Bald Eagle Protection Act and the Marine Mammal Protection Act, are intended, under normal circumstances, to protect resources from serious adverse effects from logging and other development activities. However, restoration, replacement and enhancement of resources injured by the *Exxon Valdez* oil spill present a unique situation. Without passing judgment on the adequacy or inadequacy of existing law and regulation to protect natural resources and services, scientists and other resource specialists agree that, in their best professional judgment, protection of the habitat in the spill affected area to levels above and beyond that provided by existing law

and regulation will have a beneficial effect on the recovery of injured resources and lost or diminished services provided by these resources;

3. There has been widespread public support for the protection of small parcels; and

4. The purchase of this small parcel is an appropriate means to restore a portion of the injured resources and services in the oil spill area.

THEREFORE, we resolve to provide funds for the United States Fish and Wildlife Service to offer to purchase and, if the offer is accepted, to purchase all of each seller's rights and interest in the parcel; and to provide funds necessary for closing costs recommended by the Executive Director of the Trustee Council ("Executive Director") and approved by the Trustee Council and pursuant to the following conditions:

(a) the amount of funds (hereinafter referred to as the "Purchase Price") to be provided by the Trustee Council to the United States shall be the final approved appraised value of the parcel, as identified above, totaling \$120,000;

(b) authorization for funding for the foregoing acquisition shall terminate if the purchase agreement is not executed by June 30, 2002;

(c) filing by the United States Department of Justice and the Alaska Department of Law of a notice, as required by the Third Amended Order for Deposit and Transfer of Settlement Proceeds, of the proposed expenditure with the United States District Court for the District of Alaska and, if necessary, with the Investment Fund established by the Trustee Council within the Alaska Department of Revenue, Division of Treasury ("Investment Fund"), and transfer of the necessary monies from the appropriate account designated by the Executive Director;

(d) a title search satisfactory to the United States and the State of Alaska is completed by the acquiring government and the Seller is willing and able to convey fee simple title by warranty deed, or by limited warranty deed acceptable to the U.S. Department of Justice and the Alaska Department of Law;

(e) no timber harvesting, road development or any alteration of the land is to be initiated on the land without the express agreement of the United States and the State of Alaska prior to purchase;

(f) a hazardous material survey satisfactory to the United States and the State of Alaska is completed;

(g) compliance with the National Environmental Policy Act;

(h) a conservation easement satisfactory to the U.S. Departments of Justice and the Interior and the Alaska Department of Law shall be conveyed by the seller to the State of Alaska; and

(i) approval of the Bureau of Indian Affairs (BIA) for sale of this allotment must be secured before the transaction closes.

It is the intent of the Trustee Council that any facilities or other development on the foregoing small parcel after acquisition shall be of limited impact and in keeping with the goals of restoration and that there shall be no commercial timber harvest nor any other commercial use of the small parcel excepting such limited commercial use as may be consistent with applicable state or federal law and the goals of restoration to pre-spill conditions of any natural resource injured, lost, or destroyed as a result of the EVOS and the services provided by that resource or replacement or substitution for the injured, lost or destroyed resources and affected services as described in the Memorandum of Agreement and Consent Decree between the United States and the State of Alaska entered August 28, 1991 ("MOA") and the Restoration Plan as approved by the Trustee Council ("Restoration Plan").

By unanimous consent and upon execution of the purchase agreement and written notice from the United States Fish and Wildlife Service and the Executive Director that the terms and conditions set forth herein and in the purchase agreement have been satisfied, we request the Alaska Department of Law and the Assistant Attorney General of the Environment and Natural Resources Division of the U.S. Department of Justice to take such steps as may be necessary for withdrawal of the Purchase Price for the above referenced parcel from the appropriate account designated by the Executive Director.

Approved by the Trustee Council at its meeting of February 25, 2002, held in Anchorage, Alaska, as affirmed by our signatures affixed below:

DAVE GIBBONS
Forest Supervisor
Forest Service Alaska Region
US Department of Agriculture

CRAIG TILLERY
Assistant Attorney General
State of Alaska

DRUE PEARCE
Senior Advisor to the Secretary
for Alaskan Affairs
U.S. Department of the Interior

JAMES W. BALSIGER
Administrator, Alaska Region
National Marine Fisheries Service

FRANK RUE
Commissioner
Alaska Department of
Fish and Game

MICHELE BROWN
Commissioner
Alaska Department of
Environmental Conservation

Attachment A: Restoration Benefits Report

Attachment A

Resolution 02-06 Small parcel – KAP 285

Parcel ID: Roderick Carlson Native Allotment
EVOS Parcel Number KAP-285
USFWS Parcel Number AP-18

Rank: N/A **Acreage:** 159.98 **Agency Sponsor:** USFWS

Estimated Value: \$120,000

Location: Hook Bay, Alaska Peninsula
U.S. Survey 11264, Lot 2
Sec. 32, T. 42 S., R. 56 W., Seward Meridian

Landowner: Roderick Carlson

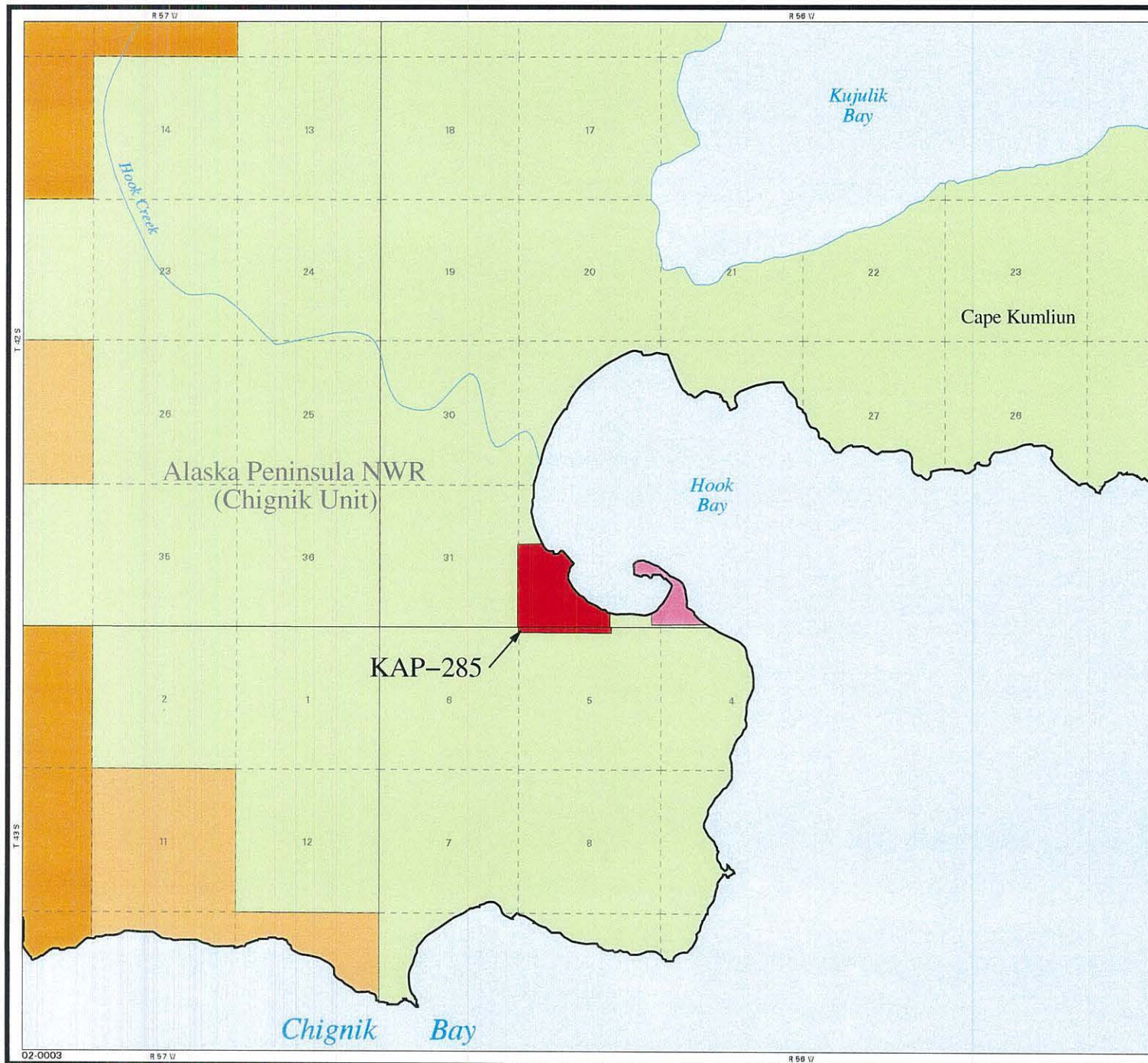
Address: P.O. Box 70
Chignik, AK 99564

This parcel lies on the western shore of Hook Bay within the Alaska Peninsula National Wildlife Refuge about 18 miles northeast of the village of Chignik Lagoon. The parcel is surrounded on all sides by refuge lands except the northeast where the parcel adjoins Hook Bay. Hook Bay provides a natural anchorage sheltered from winds and tides, making it a likely parcel for development. This parcel provides both legal and physical access to Alaska Peninsula Refuge lands. The only other private land in the area is another Native allotment.

This parcel would become part of the Alaska Peninsula National Wildlife Refuge. The accessibility and natural values of the property give it significant development potential. The parcel has restoration benefits in its own right, though the greatest benefit of this acquisition may well be the elimination of highly developable inholdings with easy access. Development on this inholding would be incompatible with refuge purposes and would create significant natural resource management problems for the refuge.

There are no known bald eagle nest sites located on the parcel, but the area may be used by foraging eagles. The stream which crosses through this parcel supports spawning salmon. Harlequin ducks may use the waters of Hook Bay for foraging, but surveys for this species have not been conducted in the area. Both river and sea otters forage in the near shore waters and streams.

This parcel and one other native allotment are the only private land located in Hook Bay. Further development of this parcel could create a source of human disturbance in this sheltered bay. Development of the site as a destination for commercial guiding activities would increase human use along the shore and near shore waters disturbing resident wildlife species. Development would also increase the potential for fuel spills and dumping of garbage. Acquisition of this parcel for inclusion in the Alaska Peninsula/Becharof Refuge help insure human disturbance within Hook Bay is minimized, protecting the ecology of the area.



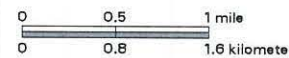
Habitat Protection Small Parcels



Alaska Peninsula NWR

Parcel: KAP-285
159.96 acres

- Privately owned small parcel considered for acquisition
- Privately owned small parcel NOT considered for acquisition
- Native Corporation (conveyed)
- Native Corporation (selected)
- National Wildlife Refuge



01/08/02 SM

LAW OFFICES
BIRCH, HORTON, BITTNER AND CHEROT
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TO: Molly McCammon

FAX NO.: (907) 276-7178
(Fax No. Verified ☐)FROM: Roy Jones *Roy*NO. OF PAGES:
(including this page)

DATE: February 25, 2002

REMARKS:

Attached is the short update on the Native Village of Woody Island that I emailed to you and Alex.

Also Molly, for you and Alex's info, I'm forwarding to you a copy of a Report to the Shareholders about what took place at the December meetings.
Hope all is well! Roy

IF YOU DO NOT RECEIVE ALL PAGES, PLEASE CALL AS SOON AS POSSIBLE AT (202) 659-5800.

File No.: 505,733.2

Telecopy Operator: Rebecca

Update on Public Use Access, Historic Sites, Fish and Wildlife Habitat, Timber Conservation Lands Proposal

Native Village of Woody Island/Leisnoi, Inc. (NVWI)

- In December, 2001, the Kodiak Island Borough Assembly held three public meetings (on the 4th, 13th, and 20th) to discuss and then to take action on this lands proposal. In testimony and in letters a number of Natives, Native Corporation Leaders, the President and Vice President of the Alaska Federation of Natives, local residents, including PAG Member Stacy Studebaker and Mike Sirofchuk, voiced support for the overall lands package. Stacy raised her concerns about any right of way or easement for a future road through the Termination Point parcel. Opposition to the proposal was raised by Mr. Stratman's attorney, a friend of his, a former wife to Mr. Stratman, and several others.
- On December 20, 2001, the KIB Assembly passed a resolution unanimously directing the Borough Manager to "participate in ongoing negotiations that will result in public acquisition of these parcels . . ."
- On January 9, 2002, the United States filed a "Disclaimer of Interest" in the NVWI lands.
- On January 15, 2002, United States Federal District Court Judge Russel Holland issued an order quieting title to the NVWI lands through approving the Disclaimer of Interest of the United States. Judge Holland quoted the U.S. Ninth Circuit Court of Appeals September 24, 2001, ruling in which that Court stated that "the land could not revert to the United States regardless of the outcome of the decertification proceeding."

Judge Holland also denied Mr. Stratman's motion to intervene.

- Recently, Judge Holland denied a motion by Mr. Stratman for reconsideration of the January 15th Order. Stratman has filed an appeal.
- In separate actions, the NVWI is seeking reconfirmation of the certification of the NVWI approved by the BIA, the Alaska Native Claims Appeals Board and Secretary of the Interior Rogers C.B. Morton and removal of the *lis pendens* on its lands.

- This lands package has been discussed previously with NVWI Shareholders and will again be the subject of shareholder informational meetings on March 1, 2 and 3, 2002 in conjunction with the NVWI Annual Meeting.
- The NVWI would like to work with the Trustee Council so as to refine and finalize this lands package, obtain necessary and appropriate appraisals, and work out a lands agreement on these lands.

Special Report to the People of
the Native Village of Woody Island/Leisnoi, Inc.

January 2002

**Native Village of Woody Island/Leisnoi, Inc. Shareholders Stand Up For Their Heritage.
Their Culture and an End to the Endless Litigation**

On Tuesday evening, December 4, 2001, shareholders of the Native Village of Woody Island/Leisnoi, Inc. (NVWI) stood up, one by one, before the Kodiak Island Borough Assembly, to firmly, eloquently, and passionately defend themselves, their heritage, their culture and the history of the NVWI.

The setting for one of the most extraordinary examples of civic action and Alutiiq pride that many attendees had ever witnessed was a work session of the Kodiak Island Borough Assembly.

Public Use Lands Proposal

Among the items on the agenda for the evening's work session was a discussion of the "Public Use, Historic Sites, Fish and Wildlife Habitat, Timber Conservation Lands Proposal" of the NVWI. Bruce Robertson submitted a prepared statement explaining the genesis and rationale of the lands proposal. Bruce indicated that the Native Village of Woody Island regretted the concern created within the community by the posting of the lands in 1995, even though such posting was prompted in part by certain threats to the resources of the lands. He said that the lands package was developed after consultation with many in the community in a way so as to help repair the strained relations that resulted from that earlier action. He then called on counsel to brief the Assembly Members on the "Discussion Draft" of the proposal.

The proposal is similar to the one discussed with shareholders in shareholder informational meetings previously but with some changes urged during consultations with representatives of the Borough, the Exxon Valdez Oil Spill Trustee Council, and others of the public. It entails conserving and opening to public access for fair market value certain lands that have been patented to the NVWI, and that have unique natural resource values of special interest to the public.

The areas involved are: Termination Point, Long Island, the American River, the Olds River, Myrtle Creek Beach, Roslyn Beach, portions of Cape Chiniak, the sea lion haul out at Long Island, Svitolak and Chiniak Islands, timber on Woody Island and at Chiniak and most of the land along the road system for hunting subject to an appropriate and effective way to ensure a waiver of liability by hunters who wish to use the lands for hunting subject to state game laws. . . similar to the way such matters are dealt with elsewhere. Counsel explained that the NVWI also sought to enter into several land exchanges so that lands on Woody Island owned by the NOK (including land in the old North Village Site), the State and the KIB could be acquired by the NVWI in return for land NVWI owned. Such exchanges would have the added benefit of keeping costs down for carrying out the overall transaction.

This lands package, if endorsed by the Borough, the Exxon Valdez Oil Spill Trustee Council and the NVWI shareholders through a proxy solicitation, would respond to the concerns of the public in conserving and opening certain lands to public access, much of it to hunting and fishing, would alleviate land management areas of potential conflict with the Kodiak Community, and would help capitalize the corporation so that it can, at last, fulfill its responsibilities to shareholders and become a productive contributor to the economic development and growth of the Kodiak community.

The Other Side

After the briefing, Mr. Stratman's attorney, rather than addressing the lands package that was the subject matter of the briefing, began a verbal attack on the Native Village of Woody Island. He urged the Assembly not to "go down that trail . . ." presumably meaning not to work with the NVWI on a lands package that addressed most every area of known potential conflict regarding the NVWI lands and do it sensibly.

His remarks were in for the most part offensive and demeaning. He said that NVWI's "historic ties theory" regarding the land is the only theory "upon which they've ever been able with a straight face to assert entitlement to rights under ANCSA . . ." By that comment, he alluded to what we all know and that is that the historical foundation of the Native Village of Woody Island is absolutely irrefutable.

He went on to say about the people of Woody Island, "... they're at the end of the trail, we're about to tag them, and they're gonna be just a bad memory" This remark seemed to reflect a view of the other side that this matter of such personal and cultural meaning to us as Alaska Natives is to them apparently some sort of sport. After what our Alut ancestors went through during the period soon after contact with the non-Native world, not to mention what others of our people have had to endure, it is incredibly offensive to us and to our families to hear this type of demeaning reference today.

During the meeting, Stratman's attorney claimed that the Alaska Federation of Natives "will not take [NVWI] on as part of their lobbying agenda." Nelson Angapak, Vice President of the Alaska Federation of Natives stated in a letter dated July 24, 2000, that the delegates to the 1999 Annual Convention "unanimously passed" Resolution 99-84, entitled Congressional Legislation Confirming the Native Village of Woody Island's Original 1974 Certification." The Resolution also urged "Alaska's Congressional Delegation to sponsor legislation confirming the Native Village of Woody Island's original 1974 certification once and for all." The NVWI has waited to request further action by AFN until it has completed efforts to work out a public use lands package that could be supported by the Kodiak Island Borough Assembly. (Please see excerpt from the AFN letter later in this report).

Alaska Natives and Community Leaders Speak in Support

When it came time for the public to speak, Tony Drabek, President of Natives of Kodiak, and a leader within the Kodiak Community, stepped forward to strongly express his support for the NVWI.

Drabek said, "I think Leisnoi has put out a very creative and very bold package . . . It's in the public's interest . . . We strongly urge you [the Borough] to get behind this process. It's the right thing to do for Leisnoi . . . and the community of Kodiak."

Tina Hoen, who was raised on Woody Island, said the picture of Woody Island Natives on the cover of the NVWI historic briefing booklet showed her grandmother, Ella Chabitnoy, holding Tina's mother, Natalie Simenoff, when she was a baby. "I lived on Woody Island; I was raised there; I started school over there." She went on to say, "We have witnessed prejudice and anger and downright thievery and lies. We were taught it was ill-mannered to be pushy and rude . . . but a lot of this has to be said."

Judge Roy Madsen said he was a "proud member of Leisnoi." Two of Judge Madsen's sisters lived for a period of time in the orphanage on Woody Island. He also said, "what Mr. Schneider didn't mention was that we wouldn't be here tonight if Leisnoi had been willing to deed to Stratman for himself and his attorney 17,000 acres (about a third of the lands patented to the Native Village of Woody Island) of land."

Robbie Townsend Vennel, acting President of the Afognak Native Corporation, said that Afognak Native Corporation supports what Leisnoi is trying to do. She said, "What Leisnoi is after is whether or not the proposal is in the public interest. The thing that struck me so much about what is being offered here is that it really represents the community concerns."

Emil Norton, whose father settled on Woody Island in 1893, and who is not a NVWI shareholder, said that the certification matter "has to be settled now."

Jana Turvey, a shareholder and "proud member" of the Native Village of Woody Island and a Board Member of Koniag, Inc., with 6,000 shareholders, glanced around her shoulder to direct her comments toward Schneider and said, "How dare Mr. Schneider come up here and call us phonies and phantoms." She spoke of her many family members who enrolled to the NVWI whom she and others have lost during this long period when Stratman has continued the litigation, and said, "We don't want to lose anymore before it's over."

Geneva Marie Hartman Macinko expressed her outrage over Schneider's slurs. She said to him, "You made me feel like dirt."

Bruce Robertson also testified about his great grandfather who placed Bruce's grandfather and his grandfather's sister in the orphanage when his great grandfather could no longer care for the children after their mother had died from one of the non-Native disease epidemics that almost annihilated the Alutiiq people in numerous villages, including the village on Woody Island, during the Russian and American periods of Alaska's history. There is an account in the Orphanage Newsletter of Bruce's great grandfather's visit to his children in the orphanage traveling to see them in a bidarka from Kaguyak. He said, "A lot of people don't know the history of us shareholders . . ." He went on to say, "Don't let Mr. Schneider tell you this litigation is at a close end. It is not. It continues. It goes to court; it gets appealed. We've had 71 shareholders die since the litigation began."

Omar Stratman spoke very fly and said he "would take zero" if the Native Village of Woody Island would concede de-certification and dismiss the appeal. His attorney subsequently (at the end of December) communicated that what they actually sought in settlement was:

1. Approximately 17,000 acres of land in surface fee that Mr. Stratman says he wants because he thought he had a settlement while the NVWI was merged that would have resulted in conveyance of land to him. That action was the subject of an NVWI shareholder suit and resulted in the Alaska Supreme Court ruling in favor of the NVWI in the de-merger case resulting in NVWI not being bound by the purported settlement agreement.
2. Payment to Mr. Stratman or his designee, in cash or in land, a sum amounting to the value of legal services secured by him over the last 30 years; Separately, his attorney has communicated that what he seeks is \$10,000,000; and
3. For the NVWI to improve on its public use lands package since the package developed by the NVWI over the past several years has "forced" Mr. Stratman and his attorney to "promise . . ." that we can accomplish more for it [KIB] than Leisnoi has offered . . ."

[more specifics on this will be covered in detail with shareholders in the informational meetings in early March]

State Senator Alan Austerman addressed the Assembly generally in support after he made sure that people knew that he had inherited shares of the NVWI from a deceased shareholder and had expressed certain concerns in the past about Termination Point.

Mike Sirofchuck, Chairperson of the Kodiak State Parks Citizens' Advisory Board, expressed strong support for the lands package reinforcing the resolution of support of the Advisory Board of November 12, 2001. He expressed concern about any potential road through the Termination Point parcel as was expressed in the resolution.

Stacy Studebaker, President of the local Chapter of the Audubon Society, strongly supported the lands proposal as representing "an unprecedented opportunity to increase" lands that would be conserved and open to the public along the road system. She, too, opposed any road through the Termination Point parcel.

Frank Peterson, a non-NVWI shareholder, provided a review of many historic documents and events relevant to the long, tortuous road this village has traveled and other Alaska Natives have walked. He strongly supported the NVWI.

Dave Kubiak, local Kodiak resident, said that he circulated in 1997 a petition urging that the Exxon Valdez Oil Spill Trustee Council acquire and open to the public Long Island, currently patented to the NVWI. He said that he garnered over 650 signatures including many people from Ouzinkie. He voiced support for the lands package and particularly for Long Island.

KIB Assemblyman Greg Razo said that he would like to see the mayor direct staff to draft a resolution approving the lands package in its entirety and for it to be discussed at a work session on December 13, 2001, and in a formal meeting on December 20, 2001. Other members concurred.

The meeting was a poignant, moving, and eloquent expression of what was in the hearts and minds of many Native Village of Woody Island enrollees and others who voiced their support for the NVWI effort to reclaim their heritage, have a place to call home, and, in the process, do something of lasting benefit to the public. It would establish and settle the essential land patterns along the road system, and help spur economic development, including tourism based on certain lands that would become open to the public for recreational purposes in perpetuity and for hunting.

Subsequent Action by the Kodiak Island Borough Assembly

On December 13, 2001, the KIB Assembly held another public work session. Shareholders and others from the public again spoke in support of the lands package and some conveyed their desire to see the longstanding litigation brought to a sensible conclusion. Some individuals spoke for Mr. Stratman and against NVWI. The Assembly directed that the draft Resolution regarding the lands proposal be made available to the public and be on the agenda for a formal meeting of the Assembly on December 20, 2002.

On December 20, 2001, the KIB Assembly held a formal public meeting that included on the agenda the NVWI lands proposal. Mr. Stratman's attorney urged the Assembly not to pass a resolution, but, that if they did, to include a provision that would make clear that the action of the Assembly should not be construed as taking sides in the

litigation. He also sought to obtain support for having any funds that were generated from a land transaction to be escrowed until the litigation was completed.

When the counsel for the NVWI spoke and briefed the Assembly further on the lands proposal and read Bruce Robertson's statement into the record, he said that the NVWI certainly supported an amendment that would make clear the Assembly's actions were on the public use aspects of the lands package and not on the litigation. Counsel indicated that compromise language could probably be worked out with a few edits to the draft. The Deputy Mayor who chaired the meeting requested the counsels for the two sides get together during the meeting and try to work out such language. They did and the compromise amendment was included by the Assembly in the Resolution. The general reaction to the compromise of those in attendance and some who called in seemed to be relief and hope just seeing the two sides agree on anything . . . especially anything that might lead to a resolution of the long-standing conflict.

Mr. Stratman said that the NVWI had sued him a number of times over gravel, lease terms, lease rent, guided horseback rides, etc. He indicated that the settlement counter offer that NVWI had sent was not adequate to cover his attorney and costs. On this point, he said to the Assembly:

"When I first talked to Mr. Schneider, in the course of our discussion, he told me his fee was \$180 an hour. That was in '92. Just the other day he told me his fee had risen to \$250 an hour. Now get out your pocket calculators and calculate those figures over nine years and see what you come up with and see if one million dollars will pay for this man . . . I couldn't get enough out of that offer to pay my attorney and costs. We've had a lobbyist in Washington, D.C. for five years. What do you think that costs? Mr. Schneider pays the bills. But, he told me when I asked him about it, he said I'll pay it now but you are eventually . . . I suppose, you know, if you didn't really have all the information about this you, could look at me and say, boy, that guy cleaning up."

During the meeting, in addition to NVWI shareholders, a number of Alaska Native Leaders and others from the community spoke strongly and eloquently in support of the lands proposal including: Dennis Metrokin, President of Koniag, Inc.; Tony Drabek, President of Natives of Kodiak; Gene Sundberg of Afognak Native Corporation; Deidre Coyle, Chairman of the Board of Akhiok-Kaguyak, Inc.; Stacy Studebaker, Audubon Society and Mike Sirofchuck, State Parks Advisory Board

Dennis Metrokin testified that-- "Koniag has supported Leisnoi and fought along its side against Mr. Stratman during some 26 years of litigation over Leisnoi's existence . . . I urge you to realize . . . that the existence of Leisnoi as an ANCSA village corporation is historically, morally and, I feel, legally just. Leisnoi's cause is right, just as Mr. Stratman's cause is wrong . . . it is a travesty that Leisnoi's status was ever challenged in the courts to begin with . . . Regardless of the outcome in the courts, Leisnoi will retain title to their lands, these lands will not return to the public domain . . . the issue before you is whether or not this land proposal is good for the citizens of the Borough. I believe the answer is clear, and I urge you to do the right thing . . ." The Assembly did.

The Chairman of the Board of Akhiok-Kaguyak, Inc., Deidre Coyle, read to the Assembly a letter she and Ralph Eluska, President of AKI sent to the Assembly. In part, it stated, "For far too long and in spite of the mandate of ANCSA this challenge to the original certification of the Native Village of Woody Island has been allowed to go on . . . The Native Village of Woody Island has proposed to you . . . a remarkable lands package . . . We believe that this is a highly responsible proposal and we urge its adoption by the Assembly."

The President and Vice President of the Alaska Federation of Natives sent a very strong letter of support to the Assembly. In it they commented--

It is our understanding that attorney [for Mr. Stratman] commented before the Kodiak Island Borough Assembly in a work session on December 4, 2001, to the effect that the Alaska Federation of Natives "will not take Leisnoi on as part of their lobbying agenda." Nothing could be further from the truth . . . The Alaska Federation of Natives remains committed to remedying this egregious wrong to our fellow Alaska Natives that has taken its toll in so many ways including the loss of 71 people enrolled to the Native Village of Woody Island who will never have seen their aboriginal claims settled as promised by the United States of America to be carried out [rapidly] and "without litigation." [as provided in ANCSA] . . . The public use access lands proposal . . . is a common sense and responsible proposal. We urge that the Assembly endorse it as clearly being in the public's interest.

At the conclusion of the Assembly's consideration of the NVWI lands proposal, the Assembly voted unanimously (5 to 0) in favor of the Resolution 2001-51 directing the Borough Manager to "participate in ongoing negotiations that will result in public acquisition of these parcels."

Letters to the Editor

In the days leading up to the Assembly meeting, the attorney to Mr. Stratman and an old friend of his wrote several letters to the editor that were printed in the Kodiak Daily Mirror that many shareholders may have seen. Although the NVWI had sought in its testimony before the Assembly to focus on the lands proposal, in partial response to the letters to the editor referred to above, on the day of the Assembly meeting 18 shareholders of the NVWI sent three letters to the editor, several excerpts of which follow:

"... The Alaska Native Claims Settlement Act WAS about land ... 375 million acres of it in Alaska and aboriginal claims to it. It was about dealing fairly with those claims and thereby doing justice to people whose ancestors have been here for thousands of years and, in the process, clearing the way for the natural resources of the North Slope of Alaska ... to be developed ... for most Alaska Natives, the land claims settlement has been achieved ... For NVWI ... ANCSA has not yet worked ..."

"Woody Island was subjected to considerable impacts - some good, some bad - from the outside world, including U.S. military and FAA presence on the island. These outside impacts and others took their toll during WWII and beyond and the island's population decreased over time ... people needed to move to jobs and schools and medical help. As was urged in a letter to Secretary Morton in 1972 from a member of our Alaska Congressional delegation: Because our Native people have been compelled to move about the state to find employment, it is most difficult to determine the permanent residence of an Alaska Native without regard to the mental attitude of the individual involved." (Emphasis added).

"In response, an Assistant Secretary of Interior stated that the Department recognized the necessity of many Natives to move around both within and outside the State ... we felt that the subjective intention of the applicant with respect to his actual home should be given as much weight as possible A region or village may be the permanent residence of an applicant even though he was not actually living there on that date if he has continued to regard that place to be his home." (Emphasis added).

"Well, aside from the island being our 'permanent residence' in the sense of ANCSA, we regard Woody Island as our home and to us it is our home ... just as others in the military regard a place their home while they are away sometimes for extended periods of time"

"A phantom village we are not. Our Alutiiq heritage and history are rich, varied ... and hold great meaning to each of us. Our village was approved properly by the Secretary of the Interior [Hon. Rogers C.B. Morton]. We have taken and continue to take responsible steps to halt what we regard as a direct assault on our heritage and move on for the sake of all concerned."

Signatories: Tina Hoen, Jana Turvey, Geneva Macinko, Hazel Ardinger, Theresa Baker, Norma Peterson, Chrislyn Hoen, Sherringa Holmstrom, John Peterson, Troy Larsen, Roy Madsen, Bruce Robertson, Kelly Simoonoff, Jr., Shannon M. Johnson, Carol Mathews, Nikki M. Adams, Kane Wolf, Elizabeth A. Olsen.

Quiet Title Action

In addition to this major step forward by the Assembly of adopting the Resolution to address the public use lands package proposed by the NVWI, the NVWI Board was very pleased that the United States filed a "Disclaimer of Interest" in NVWI lands and on January 15, 2002, Federal District Court Judge Russel Holland approved that Disclaimer. By those actions, the United States has reiterated what the Ninth Circuit Court of Appeals ruled four months ago: "the land could not revert to the United States regardless of the outcome of the de-certification proceeding." The Court also denied Mr. Stratman's motion to intervene as moot. We will report on this further at the Shareholder Informational Meetings and at the Annual Meeting in early March.

For Your ReferenceQuotes from Correspondence to Congress and to Others

"Unreasonable parties should not be allowed to hold Leisnoi hostage through manipulation of the legal system any longer. Our Native people who are enrolled in Leisnoi deserve the opportunity to build their corporation and receive the benefits as intended by the Alaska Native Claims Settlement Act (ANCSA)."

Dennis Metrokin, President; Uwe Gross, C.E.O., Kontag, Inc., July, 2002

"... please take the time and effort to statutorily reconfirm the certification of the Native Village of Woody Island, Leisnoi, Inc. ... Put an end to the nonsense. Let those people whose heart, familial connections, history, use, and aboriginal claim is tied to Leisnoi and Woody Island receive what is theirs ..."

Arnold "Ole" Olsen, Alaska Native Leader and Past President, Afognak Native Corporation, July, 2000

"This resolution (Resolution 99-84) mandates AFN management team to pursue a legislative solution on the certification of Leisnoi, Inc. as an ANCSA village corporation We believe this action will bring a just and moral resolution to the Native People enrolled to Leisnoi, Inc. (Native Village of Woody Island)."

Nelson N. Angapak, Sr., Executive Vice President, AFN, July, 2000.

"I encourage the Congress to reconfirm this certification It is clearly in the public interest to resolve this ... and give the people of Kodiak and the United States a wonderful conservation opportunity ... this effort by the Native Village of Woody Island/Leisnoi, Inc. is precisely the sort of win-win deal we should all get behind."

Rick Steiner, Director, The Coastal Coalition, July, 2000

"I was raised on Woody Island. I started school on Woody Island in a one room school that was filled with a good number of my relatives ... to try to explain everything [what Woody Island means to me] would be like trying to fill a lake with a teaspoon There is a certain security in knowing that where my feet are walking my parents also walked and my grandparents too."

Tina Hoer, Enrollee, Native Village of Woody Island, Kodiak, Alaska, November, 2001

"My name is Carlene Mahle and I am a proud member of the Native Village of Woody Island My mother who lives with me is Sarah Petrikoff Bandy. Her parents, Michael and Feona Pestrikoff lived on Woody Island until Feona's untimely death untimely during the 1918 Influenza Epidemic. My mother was eight years old at the time and was placed in the Baptist Orphanage on Woody Island where she remained until she was eighteen. ... She is now 91 years old and frequently talks about returning once again ..."

Carlene Mahle, Kodiak, Alaska

"My maternal Grandmother Jenny Louise Pestrikoff Sundberg and her husband Rudy Lerol Sundberg ... lived there [Woody Island] off and on during the time they raised 12 children. Two of those children are buried on Woody Island."

"My maternal grandmother Angeline Panamaroff Pestrikoff Malaknak lived there [on Woody Island] ... till ill health caused her to move to Seward and the old folks home ... She died in Seward but always wanted to be back on Woody Island."

Geneva Marie Hartman Macinko, Kodiak, Alaska, November, 2001

"The Aleut Peoples of this region existed long before Stratman, Europeans, Russians, etc. Our umbilical cord is tied to these lands and waters since time immemorial. Our forefathers occupied this region through subsistence, customs and traditions throughout wars and peacetime."

"By 1970, we had already lost many families due to epidemics, wars and displacement. The mission on Woody Island took in many orphaned children. My grandmother, Frieda Refl, and many others stayed there. We had given much - and much had been taken."

"But we survived and we hold onto a common tie that bonds our people together - the lands and waters that have fed and sustained us ... I am not a Leisnoi shareholder My ties to all other Native peoples of this region come from the land and waters we have shared and fed our children from."

"We have given much - there is no more to give. You have not only slapped the face of Leisnoi and its shareholders, you have extended the blow to all of us, regarding our ties and rights in these lands and waters"

"It is time to stand up -- and stand tall. Do not let the fist of one man define who we are." (emphasis added).
Dolly C.R. Reft, Kodiak, Alaska, Kodiak Daily Mirror, July 2001

Several Historical Excerpts and Information Regarding Native Presence on Woody Island

- When approximately 65 villages were consolidated into seven amalgamation villages, as Alexandrovich Tikhmenev wrote in the 1850's, Woody Island was one of those seven Native villages.
- Two hundred thousand of the \$7.2 million purchase price for Alaska was attributable to the Russian commercial operations established on Woody Island.
- In the late 1800s, a Baptist orphanage and mission was established on Woody Island. Many of the children at the orphanage were children of Natives who died in the numerous epidemics that virtually annihilated many communities. Approximately 30% of the shareholders trace their roots to either living in the orphanage themselves or are descendants of those who did.

Over the years, the Native people of Woody Island felt, oftentimes in very harsh ways, the impacts of non-Natives outsiders. What were clearly assaults upon a Native culture and way of life took its toll. The combination of above and related events affected the Alutiiq people in many ways as people sought food, livelihoods, education for their children, and medical care. However, all of those forces together have not extinguished the great attachment and love that the people of the Native Village of Woody Island have for this island, their heritage, and its history. These feelings are genuine, they are deeply felt.

That there has been a Native presence on Woody Island historically is irrefutable. The following excerpts from several historical and related documents help underscore briefly some of the historical foundation, which was part of the backdrop to the certification of the Native Village of Woody Island under ANCSA.

"On the Wood Island - - - 3 (barabaras)" . . . Now, if we multiply this number by eighteen, the average estimate of persons (men, women, and children) in a barabara, the number of natives will be (54) . . . The oldest inhabitants of the island (Kodiak) say that when the Russians arrived amongst them the population was double what it is now . . ."
Voyage Round the World in the Years 1803, 1804, 1805, and 1806, performed, by order of His Imperial Majesty Alexander the First, Emperor of Russia, in the Ship Neva, by Urey Lisiansky, 1814.

"Leisnoi (Woody) Island is named for the trees growing on it . . . On the curve, facing Kad' iak, is an Aleut settlement, called in Aleutian "Chiniak" and by the Russian traders "Aleksashkino Zhilo . . ."
 "Of these [major islands] Island are the largest, and are inhabited by a few hundred people . . . A large village of Aleuts . . . is located near the company's head-quarters [on Woody Island]. Their houses are not so well built as those of their neighbors, being merely large holes in the ground, covered with a roof of timber . . ."
The Overland Monthly, Volume VIII, San Francisco: John H. Carmany & Company, 1872.

"Woody Island, 1 American, 62 Creoles, 104 Aleuts . . ."
The Alaska Appeal, Vol. I, No. 19, San Francisco, December 30, 1879.

"Dad enough are the indigenous ills of the savages in Alaska. They were, however, nothing to the horrors which followed the importation of small-pox by the Russians in 1838-1839 . . . It usually carried in its grim grasp one-half of the whole population then living in that large area to an abrupt and violent death - several districts were so afflicted that not a soul escaped - every human being was exterminated . . . A very natural question arises . . . as to whether or not the savages of Alaska will ever increase in numbers or diminish to actual extermination as time advances . . ."
 Emphasis added).

Our Arctic Province, Alaska and the Seal Islands, Henry W. Elliott, 1887.

These woods [on Wood Island] were not merely carpeted with moss, they were upholstered; the ground was padded nkle deep, and under every tree was a couch of the most luxuriant kind."

"Narrative, Glaciers, Natives, Harriman" Alaska Expedition, by John Burroughs, John Muir and George Bird, Grinnell, Vol. 1, 1901.

Leisnoi. (Russian: 'woody'). A kanigmiut village on Wood id., near Kodiak, Alaska.; pop. . . 120 in 1890."
Letter of Transmittal, Smithsonian Institution, Bureau of American Ethnology, Washington, D.C., July 1, 1905.

"U.S. Census report indicating that 168 people live on Woody Island, 106 were Native villagers, including 54 children at the Mission."

Department of Commerce and Labor, Bureau of the Census, Thirteenth Census of the United States, Population—Alaska, 1910.

"Finally, in 1893 the Baptist Women's Home Mission Society opened a large orphanage on Wood Island . . . The facility . . . was established to take care of the many children whose parents had died of tuberculosis and other diseases not only on Kodiak Island but in the eastern Aleutians . . ."

" . . . smallpox broke out in Kodiak on July 8, 1837. . . by the time the team arrived in October . . . some 265 Koniag had already died, and despite their best efforts, another 473 died before the epidemic burned itself out there in 1838 . . ."

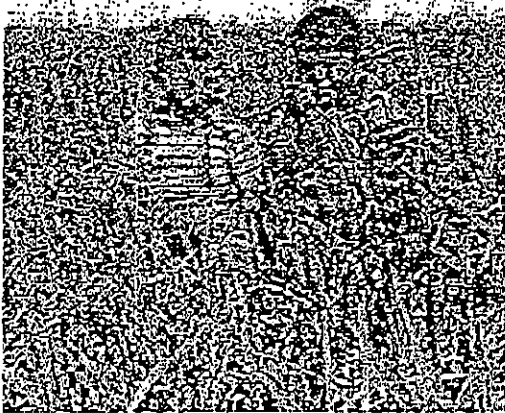
Chills and Fever, Health and Disease in the Early History of Alaska, Robert Fortune, University of Alaska Press, 1989.

Total numbers of persons in families or consumption groups in Woody Island Village = 54 Aleuts, 1 white.
Native Family Records, Department of the Interior, Office of Indian Affairs, Alaska, December 27, 1939.

These documents, the above cited being only a small portion of such similar documents, provide clear support for the significant presence and community of indigenous people on Woody Island as well as of the historical foundation that led to the certification of the Native Village of Woody Island by the United States under ANCSA. As you know, Johnny Maliknak, an enrollee to the NVWI, was born in the village and lives there today. Many Native Village of Woody Islanders have indicated that they wish to join Johnny in the village once the 27-year attack on it has ended and our village is able to function as provided in the Alaska Native Claims Settlement Act.

Board of Directors

Bruce Robertson, President
Kane Wolf, Secretary-Treasurer
Frankie Grant
Carole Pagano



In Proud Memoriam of Woody Islanders Freddy Simeonoff and Danny Harmon shown here as boys on Woody Island and who heroically gave their lives to their country in the Vietnam War.

We sadly say goodbye to John Yovino who passed on January 16, 2002 while serving as a director on the NVWI Board. Just two weeks before his death John expressed his strong desire to continue his service on the Board in order to see its goals to conclusion in order to best serve the shareholders.

We further mourn the loss of Fred Zharoff, Sr., Edward Pagano and Dyan Conaway who all, at difficult times, served as directors and officers of the NVWI with great dedication.

We will miss shareholders Gilbert Ilirzel and Virginia Lynn Lee who passed as well joining a total of 71 shareholders who did not live to see the benefit of their aboriginal rights from ANCSA.

Experts amazed at oil left in Sound

■ **DAMAGE:** Intertidal marine life show 1989 spill's effects.

By DOUG O'HARRA
Anchorage Daily News

Sea otters have evidence of liver damage. Harlequin ducks have metabolized fresh hydrocarbons.

And certain beaches in Prince William Sound have far more oil than anyone thought possible a dozen years after the Exxon Valdez tanker struck Bligh Reef, according to a rigorous survey conducted last summer.

Much of that oiled sediment underlies the flat productive shore of the western Sound, homeland to mussels and clams and other intertidal life, said federal chemist Jeff Short of Auke Bay Laboratory in Juneau.

"It's more than it looks," he said.

Other studies done as part of a continuing scientific review of the oil spill have documented problems among certain species that forage on the nearby sea floor.

The findings were presented Tuesday by scientists during the opening session of the state-federal Exxon Valdez Oil Spill Trustee Council's annual workshop. They suggest that lingering oil is leaching into the food chain, where it hurts local populations of sea otters and harlequin ducks.

"We did indeed find quite a lot more oil than we expected to see," Short said. "Most of the subsurface oil was in the fresh oil category, and by fresh oil I mean chemically, compositionally; it hasn't really changed very much since late in the summer of 1989."

Exposure to this oil may no longer threaten overall animal populations. But sea otters and harlequin ducks in the Knight-Green island areas have been ingesting hydrocarbons and apparently suffering damage, according to reports by biologists Brenda Ballachey of the U.S. Geological Survey and Dan Esler of Simon Fraser

See Back Page, SPILL



ERIK HILL / Daily News file photo

Last July, researchers Mandy Lindeberg of Juneau, left, Maciej Maselko of Anchorage and Wayne McDonald of Tatitlek collected samples of subsurface sediments in Bay of Isles on Knight Island in Prince William Sound. The result of their research was presented Tuesday at the Exxon Valdez Oil Spill Trustee Council's annual workshop.

SPILL: Exxon, chemist dismiss Juneau lab's findings

Continued from A-1

University in British Columbia. This damage includes liver problems in otters, including abnormal tissues found last summer during endoscopies and biopsies conducted in the field, Balachey said. Otter and duck numbers in oiled areas have continued to decline, while populations in nonoiled bays fare much better.

The tanker hit the charted reef in March 1989, dumping 11 million gallons that spread throughout much of the Sound and beyond. That this oil still has the power to harm wildlife, even if on a limited scale, is one of the most disturbing and startling findings to come from a decade of research and monitoring, several scientists said.

"The oil was quite a bit more persistent and quite a bit more toxic than we thought in 1989," Short told the audience during a question-and-answer period.

An Exxon Mobil official and a Maine chemist dismissed the idea that the spill still causes significant damage to life in the Sound.

"What science has learned in Alaska and elsewhere is that while oil spills can have acute short-term effects, the environment has remark-

able powers of recovery," said company vice president Frank Sprow in a statement e-mailed from company headquarters in Irving, Texas.

Bowdoin College biochemist David Page, who has conducted studies for Exxon, said he was skeptical of Short's findings.

"For at least the last seven years, natural factors in PWS have been the major factor in governing ecological changes," he added in an e-mail.

The meeting continues today at the Egan Convention Center in Anchorage with discussions of how a long-term research program to monitor the Gulf of Alaska can tie in with other research from Southeast Alaska and the Bering Sea.

As about 100 scientists and others gathered in a basement hall on Tuesday, seven biologists gave reports on lingering oil and the status of fisheries, birds and marine mammals in the spill zone. Included was a presentation on the beach survey, conducted by Auke Bay Lab with \$572,000 from the Trustee Council and help from the Bureau of Economic Geography at the University of Texas.

Over 90 days last summer, a field crew visited

91 sites along about five miles of beaches, covering about 20 percent of the area classified as heavily or moderately oiled between 1989 and 1993, Short said. They dug 6,775 pits at random locations, then dug dozens of additional pits every time they found oil to calculate how far it spread.

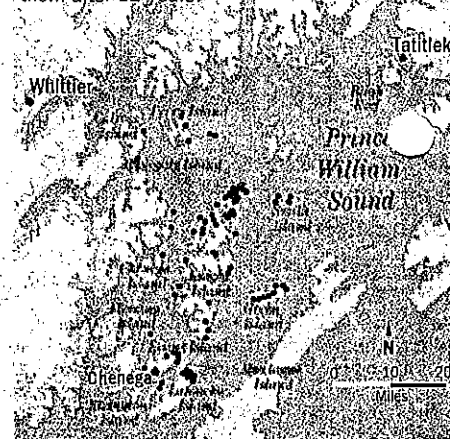
To gather enough data to make a meaningful estimate of how much oil remained and how fast it was weathering and leaching away, Short and the other investigators hoped to find oil at least 1 percent of the time.

Instead they discovered oil at 53 of 91 sites, in 568 different pits — about eight times more often than they expected. Although most of the pits were "lightly oiled," about 20 contained oil that looked as fresh as that just a few weeks after the 1989 spill — "highly odiferous, lightly weathered, and very fluid," they wrote in a preliminary report.

In the end, Short and his team estimated that about 10,000 gallons of Exxon Valdez crude remains buried under 26 to 28 acres spread along about 4.3 miles of shoreline scattered throughout the area, according to preliminary figures released on Monday. It appeared to be declining at 26 percent per year.

Prince William Sound communities participating in survey

Survey during summer of 2001 showed Valdez that 58 out of 91 sites still had oil in them after 12 years.



CHARLES ATKINS / Anchorage Daily News

■ Doug O'Hara can be reached at do'hara@adn.com and 257-4334.

PointCounterPoint: Has Prince William Sound recovered?

ce William Sound recovered?

Oil remains, appears to be affecting wildlife recovery

JEFFREY W. SHORT, *research chemist, Juneau*



Today, 12 years after the 1989 Exxon Valdez oil spill in Prince William Sound, you would have to look hard to find evidence of lingering effects. No species are threatened or endangered because of the oil spill, and the Sound supports large populations of fish, birds and marine mammals, which indicate a generally healthy ecosystem. Yet, if you did look hard, you would still find evidence of long-term effects from the spill.

Last summer, nearly 9,000 holes were dug to assess the amount of oil remaining in Prince William Sound, and much more oil was found than anticipated — around 200 times more than claimed by Exxon's contractor. The oil was most prevalent on beaches that were hit hardest by the spill, either on the surface or a foot or so beneath. The chances that one of these beaches contains some oil are around 2 to 1. At the most polluted of these beaches your chance of finding oil in a single pit is better than 1 in 3. When you find it, it will look and smell like crude oil, and it forms a sheen on water in the bottom of a pit.

Sea otters have not recovered in the Northern Knight Island area, the area of spill hit the hardest, although they have elsewhere in the Sound. They feed in the lower intertidal zone where oil was still found. Sea otters and some bird species that also forage in the same zone have biochemical markers that indicate they are still exposed to oil. It appears that oil may still be a

*These results strongly suggest
that those parts of the Sound
that were most heavily
impacted by the spill are not
yet fully recovered.*

factor impeding their recovery, possibly through ingestion of oiled prey. These results strongly suggest that those parts of the Sound that were most heavily impacted by the spill are not yet fully recovered.

Although the Sound is much cleaner now than it was in the early '90s, it remains substantially more polluted than it was in 1988 because of the lingering oil from the Exxon Valdez. Exxon continues to portray the Sound as more polluted from other sources apart from the Exxon Valdez oil spill, but their claims are riddled with inconsistencies. Much of what little we know about how oil actually affects ecosystems stems from research on the Exxon Valdez, and it is now clear that the long-term persistence and toxicity of the spilled oil is substantially greater than previously recognized.

■ Jeffrey W. Short, a research chemist at the National Marine Fisheries Service in Juneau, has studied the Exxon Valdez spill since it happened. The views here are his own, not those of his employer.

PointCounterPoint: Has Prince William Sound recovered?



POINTCOUNTERPOINT *Has Pri*

Recent study exaggerates; Sound is as healthy as ever

DAVID S. PAGE, *professor, Bowdoin College*

There is no credible scientific evidence of ongoing injury to the Prince William Sound ecosystem from the 1989 Valdez spill. While residues of the spill exist as isolated deposits in the Sound, they aren't environmentally relevant compared with petroleum coming from past and ongoing human activities. The environment of the Sound recovered from the spill long ago, in keeping with studies of much larger oil spills.

Regarding the recent reports of oil in Prince William Sound, my colleagues and I worked extensively there last summer, spending most of our time visiting beaches surveyed by researcher Jeff Short. Based on our observations, it is difficult to understand Short's claims.

We saw no evidence that Short dug 7,000 pits on 91 locations. We were able to locate and survey 78 of the 96 sites indicated in Short's study plan. We found clear evidence of activity at 33 sites and were able to map the locations of 875 pits. Had thousands been dug, we would have located many more.

We found visible evidence of oil in 196 pits at only 19 sites. The sites at which we found evidence of activity were generally those "worst case" locations in the Sound that have been known and studied for years. Seven known worst-case sites accounted for 133 of the 196 oiled pits. Even at these seven locations, remaining deposits of oil are localized and are not readily available to wildlife.

Any release of oil from these sites is negligible compared with other sources of petroleum in the Sound.

The locations of the pits at the sites demonstrate that they were chosen subjectively, with the greatest concentration of pits in areas showing oil residue. We found six times as many pits dug at sites found to have oil than sites that were found to have no oil. This approach exaggerates the extent of remaining residues of the spill based on pit tallies alone. It indicates a strong bias in the Short study and raises questions about the scientific validity of its conclusions.

I think that the Trustee Council's "nonrecovered" species list has no sound scientific basis. Claims of ongoing "spill effects" are either the results of natural or human factors not related to the spill, or the results of flawed scientific study designs based on invalid comparisons, or the use of a "return to pre-spill conditions" as a benchmark for recovery. The scientifically appropriate definition of recovery takes nonspill factors and natural environmental changes into account.

Prince William Sound today is as healthy as it would have been if the spill hadn't happened.

■ David S. Page is professor of chemistry and biochemistry at Bowdoin College in Brunswick, Maine. He has studied the Exxon Valdez spill since 1989 with the support of Exxon Mobil.

Daily News Letters

Sunday, February 3, 2002 **F-3**

Critic of oil spill study attempts to discredit government science

The Point/Counterpoint by Bowdoin College's Dr. David Page (Jan. 31) questions my integrity performing a study last summer to estimate the amount of oil remaining in Prince William Sound from the Exxon Valdez oil spill. He disputes the extent of the work actually done and charges bias during sampling, based on his shadowing of our study. In rebuttal, I note:

(1) Page did not begin shadowing our study until August, after the study was 75 percent complete.

(2) Page misrepresented our more extensive sampling of oil patches as evidence of bias, when in fact we were simply following the peer-reviewed sampling design which called for additional holes to delineate the size of oil patches detected.

(3) Page's sponsor, ExxonMobil, filed a Freedom of Information Act request for all the study records on Jan. 8, 2002, which will prove we completed the study as advertised, but he has made his allegations before he received this evidence.

(4) Page could have asked to accompany us during the survey, as did several news organizations, all of which we accommodated. Instead, Page engaged in a secretive and incompetent

attempt to audit our progress. His public attack without bothering to look at the evidence of our field records appears to indicate that Page's fieldwork last summer was a premeditated attempt to discredit government science.

— Jeffrey W. Short
Auke Bay

Prince William Sound oil study critic's fraud charge is unfounded

In a recent Point/Counterpoint article, Exxon consultant Dr. David Page questioned the integrity of a study led by National Oceanic and Atmospheric Administration scientist Jeffrey Short. The study led to scientific estimates of the amount of oil remaining in Prince William Sound from the 1989 Exxon Valdez oil spill.

While scientists often disagree with interpretations of research efforts, it is rare to charge fraud. We can assure the public that the work was done as reported. News reporters, support-vessel crew, a government archaeologist, residents of Tatitlek and Chenega, and other participating scientists could bear witness to the work. Notebooks with the raw data, including daily entries of holes dug and oil found, provide corroborating evidence.

National experts reviewed the project's sampling design to make sure it was not biased. The study was conducted openly in the field, with several on-site visits by news media and intense public scrutiny. The results will soon be published in the open scientific literature, where unbiased scientists can view the results and the interpretations.

We are requesting the National Academy of Sciences to evaluate Dr. Page's allegation, along with the data collected by the National Oceanic and Atmospheric Administration. If Dr. Page is unwilling to cooperate, he should print a retraction of his allegation.

— Dr. Robert Spies, chief scientist,
EVOS Trustee Council

Molly McCammon, executive director,
EVOS Trustee Council

Dr. Jim Balsiger, Alaska administrator,
National Marine Fisheries Service

Author's rebuttal doesn't make oil study any less flawed, biased

I stand by my observations and experiences that formed the basis of my opinion published Jan. 31 in the Daily News.

Mr. Short's recent rebuttal ignores the details of my observations that indicated a strong bias in his Prince William Sound oil study. Many of Short's pits were dug at the top of the beach, well above the surf zone. While wave action may have eliminated evidence of some pits lower in the tide zone, I doubt we missed thousands of pits because of this.

We found many locations with far fewer than the required minimum of 100-plus pits, indicating a departure from Short's published study plan. Sites with no oil had far fewer pits than those with oil, indicating bias and inconsistent effort. Short's study plan required that each pit be 50 centimeters deep. We found pit depths to be highly variable and generally less than 50 centimeters, rendering oil amount estimates meaningless.

If Short is so confident of his findings, why not release all his data now, including field notes, for the public and scientific community to see? Why must we file a Freedom of Information Act submission to try to get the data? I am confident that Short's conclusions about the extent of remaining oil in Prince William Sound will not stand the test of rigorous and unbiased scientific scrutiny.

— David S. Page
Professor, Bowdoin College
Brunswick, Maine

Mr. Page — aka Exxon — should educate himself before criticizing

With regard to David Page's Point Counterpoint (Jan. 31) and his so-called extensive observations, I think most Alaskans realize that any "study" funded by Exxon is suspect, but let's assume that Page was unbiased in his statement that "we saw no evidence that Short dug 7,000 pits." A little effort would have uncovered the fact that many pits were refilled to avoid further contamination of Prince William Sound. Also, 9,000 pits were dug and a simple request of Auke Bay Labs would confirm their locations. However, when your task is to distort, misinform and cover up, good science takes a back seat.

Page (Exxon) further states that "location of the pits ... were chosen subjectively." Actually,

the sites and pit locations were chosen at random. A disconcerting number of the pits missed visible surface oil. Heavily oiled Naked Island sites were not even selected by this random process. When oil was found, more pits were dug to ascertain extent and magnitude, a standard technique in peer-reviewed science. There are many more distortions in Page's column.

The conclusions of the Short study are, if anything, conservative and well documented and should be taken seriously to really understand what is happening in the Sound. To undermine the results of the Short study with personal opinion does a disservice to credible scientific process.

— Michael Yourkowski
Homer

Monday, February 11, 2002

Exxon is wrong; Sound's herring are far from healthy and recovering

It makes me bitter that one of the world's largest and most profitable companies continues to kick us while we are down.

Exxon and its paid mouthpieces claim that Prince William Sound is as healthy as if the oil spill hadn't happened. As a Prince William Sound herring fisherman, I haven't been able to commercially harvest herring here going on nine years. That doesn't sound healthy to me. At the time of the spill, herring biomasses in the sound were at record levels. In 1993 there was an unprecedented crash. Laboratory studies have since shown that exposure to relatively low concentrations of Exxon oil can compromise the adult herring immune systems, causing them to be susceptible to disease. The Sound herring population has contracted a viral disease that nine years later has reduced their masses to a historical low. Herring stocks have gone from 113,000 metric tons in 1989 to approximately 6,000.

Healthy? Recovering? Try decimated. A major source of income for Cordova and a principal food source for the ecosystem are on the verge of extinction. Despite what Exxon and its supporters claim, people depend on the Sound are still struggling with the lingering affects.

If O.J. Simpson had had Exxon's PR and attorneys, he probably would be governor of California now.

-- John Platt

Cordova