

14.2.33

Exxon Valdez Oil Spill Trustee Council

645 G Street, Suite 401, Anchorage, AK 99501-3451 907/278-8012 fax:907/276-7178



MEMORANDUM

TO: Public Advisory Group

FROM: Molly McCammon
Executive Director

DATE: July 8, 1999

RE: Materials for July 15-16 meeting

Enclosed are a draft agenda and additional materials for your upcoming meeting. These include copies of HJR 13 that passed the Alaska Legislature this session; Senator Murkowski's S711, compromise legislation on EVOS investments; the resolution and attachments adopted by the Trustee Council on March 1, 1999 concerning the Restoration Reserve; and various handouts related to planning for the Gulf Ecosystem Monitoring (GEM) Program.

For our discussion on the FY 2000 Draft Work Plan, we will be using the draft plan that you should have received in the mail. Be sure to bring yours with you, although we will have extra copies at the meeting.

Also enclosed is a copy of the Alaska Geographic special edition on the oil spill. If you have any questions prior to the meeting, please don't hesitate to give me a call.

Exxon Valdez Oil Spill Trustee Council

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AGENDA

Exxon Valdez Oil Spill Trustee Council
Public Advisory Group
Fourth floor conference room
645 G Street, Anchorage, Alaska

Thursday, July 15, 1999

1:00-5:00 PM: Public Advisory Group Meeting

Friday, July 16, 1999

7:00-8:30 PM: Public Meeting on Draft FY 2000 Work Plan

8:30 am: Public Advisory Group Meeting continued

DRAFT

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PURPOSE:

1. Develop recommendations on FY 2000 Draft Work Plan.
2. Briefing on Gulf Ecosystem Monitoring (GEM).
3. Briefing on Restoration Reserve.

Thursday, July 15

1:00 PM	Welcome/roll call Approval of January 22, 1999 Meeting Summary	Charles Meacham, Co-Chair
1:10	Restoration Reserve TC Action Governance, public advice issues HJR 13 S711	Molly McCammon, Executive Director
2:45	Update on Habitat Activities	
3:00	Gulf Ecosystem Monitoring - briefing and discussion	
5:00	break for dinner	
7:00-8:30	Public Hearing on FY 2000 Draft Work Plan	Charles Meacham Molly McCammon

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

Friday, July 16

8:30 AM FY 2000 Draft Work Plan - briefing and discussion
September field trip
FY 2000 PAG meeting schedule

noon Adjourn

Adopted by Senate
May 7, 1999 19-1

By House March 17, 1999 36-2

CS FOR HOUSE JOINT RESOLUTION NO. 13(FIN)

IN THE LEGISLATURE OF THE STATE OF ALASKA

TWENTY-FIRST LEGISLATURE - FIRST SESSION

BY THE HOUSE FINANCE COMMITTEE

Offered: 3/10/99

Referred: Rules

Sponsor(s): REPRESENTATIVES THERRIAULT, Davies, Whitaker, Mulder, Harris

A RESOLUTION

1 Relating to using oil spill settlement funds to create a long-term research and
2 monitoring endowment.

3 **BE IT RESOLVED BY THE LEGISLATURE OF THE STATE OF ALASKA:**

4 **WHEREAS** the biological resources of the northern Gulf of Alaska were affected by
5 the Exxon Valdez oil spill; and

6 **WHEREAS** the Exxon Valdez oil spill disrupted the economic and social lives of
7 many of the local residents in the Prince William Sound area; and

8 **WHEREAS** a spill of the magnitude of the Exxon Valdez oil spill not only affects the
9 wildlife and fish habitat, but also has economic, social, and psychological effects in rural
10 Alaska where traditional life styles of local populations, including the Native population, may
11 be severely disrupted; and

12 **WHEREAS** baseline scientific data is inadequate to assess positively the damage of
13 the Exxon Valdez oil spill, to manage major spills, and to realistically restore the environment;
14 and

15 **WHEREAS** Alaska has more coastline than any other state in the union, making it
16 imperative that Alaska take the lead in using the accumulation of scientific knowledge and

1 promoting the advancement of scientific technology now as well as in the future; and

2 **WHEREAS**, with scientific advancements in the decades ahead, eventual enhancement
3 of many biological resources will be possible; and

4 **WHEREAS** the mission of the Exxon Valdez Oil Spill Trustee Council is to efficiently
5 restore the environment injured by the spill to a healthy, productive ecosystem, while taking
6 into account the importance of quality of life and the need for viable opportunities to establish
7 and sustain a reasonable standard of living; and

8 **WHEREAS**, because the Exxon Valdez Oil Spill Trustee Council is in charge of
9 restoring, rehabilitating, replacing, enhancing, or acquiring equivalent resources and services
10 in the oil spill region, the accumulation of scientific knowledge to manage a future oil spill
11 must be a high priority in the council's program; and

12 **WHEREAS**, although significant research projects have been supported by the council,
13 many important areas of inquiry remain that can be effectively addressed only over an
14 extended period of time; additionally, there are significant research projects relating to spill
15 technology, restoration methods, and ecosystem preservation that need to be pursued and
16 extended for maximum public benefit; and

17 **WHEREAS** the Exxon Valdez Oil Spill Trustee Council restoration plan includes
18 adequate provisions for establishing a sound future-oriented program of research and top-level
19 study that would accumulate and spread knowledge of the North to the world; and

20 **WHEREAS** the University of Alaska has taken a leadership role in many of these
21 areas of study and is strongly committed to working in rural Alaska as well as to attracting
22 students from rural Alaska; and

23 **WHEREAS** the University of Alaska is a statewide system with locations in Valdez,
24 Cordova, Petersburg, Homer, Seward, Kodiak, Juneau, Anchorage, Fairbanks, Bethel,
25 Dillingham, and many other locations in rural Alaska; and

26 **WHEREAS** the University of Alaska is currently conducting research in fisheries and
27 oceanography; and

28 **WHEREAS** endowed academic chairs would provide the continuing quality scientific
29 investigation, scientific publications, and excellence in training that will be needed by the
30 agencies and the industry responsible for resource management and development into
31 perpetuity; and

1 **WHEREAS** the establishment of selected endowed chairs in relevant instructional,
2 research or public service programs would further ensure that the lessons learned from the
3 Exxon Valdez tragedy will continue to be explored and discussed in classrooms, laboratories,
4 public seminars, and community outreach programs; and

5 **WHEREAS** a high caliber of endowed professors attract the highest quality graduate
6 students and most often have a competitive edge in securing grants and contracts; and

7 **WHEREAS** endowed university research is normally broad in scope, produces peer-
8 reviewed publications, has long-term continuity, and produces an outflow of trained
9 professionals; and

10 **WHEREAS** the University of Alaska already has an appropriate foundation for
11 managing endowed chairs, thus eliminating the cost of a new bureaucracy, and has the
12 resources to enhance an endowment in time with additional funds acquired from other
13 agencies and from industry; and

14 **WHEREAS** the Exxon Valdez Oil Spill Trustee Council expends money obtained from
15 settlement of oil spill litigation; and

16 **WHEREAS**, by October 2002, as a result of the past and anticipated future deposits
17 into the restoration reserve, it is estimated that the principal and interest in the reserve,
18 together with remaining unobligated settlement funds, will be approximately \$170,000,000
19 unless, before that time, ongoing negotiations concerning the Karluk and Sturgeon rivers and
20 adjacent lands result in a habitat acquisition agreement that obligates some of these funds; and

21 **WHEREAS**, absent a purchase agreement on the Karluk and Sturgeon rivers,
22 \$170,000,000 is the total of the funds estimated to be available to support long-term
23 restoration based on projected investment returns allowable through the federal court registry
24 under the court's existing authority and thus reasonably anticipated as available for restoration
25 purposes by the Exxon Valdez Oil Spill Trustee Council starting with fiscal year 2003; and

26 **WHEREAS** the limits of the existing investment authority of the Exxon Valdez Oil
27 Spill Trustee Council have resulted in the loss of millions of dollars in potential earnings, and,
28 to effectively address restoration needs in the future and support a comprehensive program that
29 maintains its value over time, the council's investment authority must be amended by the
30 Congress;

31 **BE IT RESOLVED** that the Alaska State Legislature supports the recent action of the

1 Exxon Valdez Oil Spill Trustees to create a long-term research and monitoring endowment
2 using \$115,000,000 of the expected reserve; and be it

3 **FURTHER RESOLVED** that the Alaska State Legislature encourages the Exxon
4 Valdez Oil Spill Trustee Council to consider using a portion of the research funds to establish
5 endowed chairs at the University of Alaska in relevant areas of research, instruction, and
6 public service; and be it

7 **FURTHER RESOLVED** that the Alaska State Legislature supports the Exxon Valdez
8 Oil Spill Trustee Council's efforts to remove the trust funds from the United States Treasury
9 in order to achieve efficiencies and maximize earnings as supported by recommendations from
10 its internal auditors and the General Accounting Office auditors, and urges the Alaska
11 Congressional delegation to work with the Exxon Valdez Oil Spill Trustee Council to achieve
12 these goals.

13 **COPIES** of this resolution shall be sent to the Honorable Tony Knowles, Governor
14 of Alaska; the Exxon Valdez Oil Spill Trustee Council; Mark Hamilton, President of the
15 University of Alaska; Michael J. Burns, President of the Board of Regents of the University
16 of Alaska; and to the Honorable Ted Stevens and the Honorable Frank Murkowski, U.S.
17 Senators, and the Honorable Don Young, U.S. Representative, members of the Alaska
18 delegation in Congress.

Committee adopted
June 30, 1999

IN THE SENATE OF THE UNITED STATES
106th Cong., 1st Session

6/29/99
4:42pm

AMENDMENT NO. _____ Ex. _____ Calendar No. _____
Purpose: Amendment in the nature of a substitute

To allow for the investment of joint Federal and State funds from the civil settlement of damages from the Exxon Valdez oil spill, and for other purposes.

-
- () Referred to the Committee on _____
and ordered to be printed
 - () Ordered to lie on the table and to be printed

Intended to be proposed by Mr. Murkowski

Viz: Strike all after the enacting clause and insert the following:

1 **SECTION 1.**

2 (a) Notwithstanding any other provision of law and subject to the provisions of
3 subsections (e) and (g), upon the joint motion of the United States and the State of Alaska and
4 the issuance of an appropriate order by the United States District Court for the District of Alaska,
5 the joint trust funds, or any portion thereof, including any interest accrued thereon, previously
6 received or to be received by the United States and the State of Alaska pursuant to the Agreement
7 and Consent Decree issued in United States v. Exxon Corporation, et al. (No. A91-082 CIV) and
8 State of Alaska v. Exxon Corporation, et al. (No. A91-083 CIV) (hereafter referred to as the
9 'Consent Decree'), may be deposited in--

(1) the Natural Resource Damage Assessment and Restoration Fund (hereafter referred to as the 'Fund') established in title I of the Department of the Interior and Related Agencies Appropriations Act, 1992 (Pub. L. 102-154, 43 U.S.C. 1474b);

(2) accounts outside the United States Treasury (hereafter referred to as "outside accounts"); or

(3) both.

Any funds deposited in an outside account may be invested only in income-producing obligations and other instruments or securities that have been determined unanimously by the Federal and State natural resource trustees for the Exxon Valdez oil spill ("trustees") to have a high degree of reliability and security.

(b) Joint trust funds deposited in the Fund or an outside account that have been approved unanimously by the Trustees for expenditure by or through a State or Federal agency shall be transferred promptly from the Fund or the outside account to the State of Alaska or United States upon the joint request of the governments.

(c) The transfer of joint trust funds outside the Court Registry shall not affect the supervisory jurisdiction of the District Court under the Consent Decree or the Memorandum of Agreement and Consent Decree in United States v. State of Alaska (No. A91-081-CIV) over all expenditures of the joint trust funds.

(d) Nothing herein shall affect the requirement of section 207 of the Dire Emergency Supplemental Appropriations and Transfers for Relief From the Effects of Natural Disasters, for Other Urgent Needs, and for the Incremental Cost of "Operation Desert Shield/Desert Storm" Act of 1992 (Pub. L. 102-229, 42 U.S.C. 1474b note) that amounts received by the United States and designated by the trustees for the expenditure by or through a Federal agency must be deposited into the Fund.

(e) All remaining settlement funds are eligible for the investment authority granted under

1 subsection (a) of this act so long as they are managed and allocated consistent with the
2 Resolution of the Trustees adopted March 1, 1999 concerning the Restoration Reserve and as
3 follows;

4 1) \$55 million of the funds remaining on October 1, 2002 and the associated earnings
5 thereafter shall be managed and allocated for habitat protection programs including small parcel
6 habitat acquisitions. Such sums shall be reduced by:

7 a) the amount of any payments made after the date of enactment of this Act from
8 the Joint Trust Funds pursuant to an agreement between the Trustee Council and Koniag, Inc.
9 which includes those lands which are presently subject to the Koniag Non-Development
10 Easement, including, but not limited to, the continuation or modification of such Easement, and;

11 b) payments in excess of \$6.32 million for any habitat acquisition or protection
12 from the joint trust funds after the date of enactment of this Act and prior to October 1, 2002,
13 other than payments for which the Council is currently obligated through purchase agreements
14 with the Kodiak Island Borough, Afognak Joint Venture and the Eyak Corporation.

15 2) All other funds remaining on October 1, 2002, and the associated earnings shall be
16 used to fund a program, consisting of --

17 a) marine research, including applied fisheries research;

18 b) monitoring and;

19 c) restoration, other than habitat acquisition, which may include community and
20 economic restoration projects and facilities, (including projects proposed by the
21 communities of the EVOS Region or the fishing industry) consistent with the Consent
22 Decree.

23 (f) The federal trustees and the state trustees, to the extent authorized by State law, are
24 authorized to issue grants as needed to implement this program.

25 (g) The authority provided in this Act shall expire on September 30, 2002, unless by

1 September 30, 2001, the Trustees have submitted to the Congress a report recommending a
2 structure the Trustees believe would be most effective and appropriate for the administration and
3 expenditure of remaining funds and interest received. Upon the expiration of the authorities
4 granted in this Act all monies in the Fund or outside accounts shall be returned to the Court
5 Registry or other account permitted by law.

RESOLUTION
of the
Exxon Valdez Oil Spill Trustee Council
concerning the
Restoration Reserve and Long-term Restoration Needs

WHEREAS, in November 1994, following an extensive public process, the *Exxon Valdez* Oil Spill Trustee Council ("Trustee Council") adopted the *Restoration Plan* to guide a comprehensive and balanced program to restore resources and services injured by the oil spill;

WHEREAS, since that time the Trustee Council has used the *Restoration Plan* to guide development of the annual work plans as well as the acquisition and protection of large and small habitat parcels important to the long-term recovery of injured resources and services;

WHEREAS, the *Restoration Plan* identified a series of large parcel purchases and the Trustee Council has been successful in obtaining habitat protection agreements with willing-seller landowners to provide protection for approximately 635,000 acres;

WHEREAS, the *Restoration Plan* recognized that complete recovery from the oil spill would not occur for decades and that through long-term observation and, as needed, restoration actions, injured resources and services could be fully restored;

WHEREAS, the *Restoration Plan* specifically recognized establishment of the Restoration Reserve to provide a secure source of funding for restoration into the future beyond the last annual payment from the Exxon Corporation;

WHEREAS, the Trustee Council has sponsored an extensive public involvement process to provide opportunity for comment on possible future uses of the Restoration Reserve including public meetings in communities throughout the spill impact region and also in Anchorage, Fairbanks and Juneau;

WHEREAS, a large volume of public comment regarding the Restoration Reserve has been solicited and received urging a wide range of uses for remaining settlement funds including a strong showing of support for additional habitat protection efforts as well as research and other restoration efforts;

WHEREAS, numerous Native tribal members and other community residents from the spill area have indicated a strong interest in continued support for community-based efforts consistent with those that have been previously funded by the Trustee Council such as subsistence restoration, Traditional Ecological Knowledge, youth area watch, cooperative management, and local stewardship efforts;

WHEREAS, the Public Advisory Group (PAG) has reviewed and discussed long-term restoration needs and use of the Restoration Reserve at considerable length and the views of the PAG members have been communicated to the Trustee Council;

WHEREAS, upon consideration of the restoration mission as provided by the settlement and the *Restoration Plan*, past restoration program efforts and accomplishments, public comments received by the Trustee Council, the views of the Public Advisory Group members, and the most current information regarding the status of recovery of the resources and services injured by the oil spill, the Trustee Council has identified substantial and continuing long-term restoration needs;

WHEREAS, full recovery of many injured resources and services is not yet complete and long-term restoration, conservation and improved management of these resources and services will require a substantial on-going investment to improve our understanding of the biology and marine and coastal ecosystems that support the resources as well as the people of the spill region;

WHEREAS, prudent use of the natural resources of the spill area without unduly impacting their recovery requires increased knowledge of critical ecological information about the northern Gulf of Alaska that can only be provided through a long-term research and monitoring program;

WHEREAS, together with scientific research and monitoring, a continuing commitment to habitat protection and general restoration actions, where appropriate, will help ensure the full recovery of injured resources and services;

WHEREAS, consistent with the *Restoration Plan*, restoration needs identified by the Trustee Council require a long-term comprehensive and balanced approach that includes a complementary commitment to scientific research and monitoring; applied science to inform and improve the management of injured resources and services; continued general restoration activities where appropriate; support for community-based efforts to restore and enhance injured resources and services; and protection for additional key habitats;

WHEREAS, by October 2002, as a result of the past and anticipated future deposits into the Restoration Reserve, it is estimated that the principal and interest in the reserve, together with remaining unobligated settlement funds, will be approximately \$170 million unless, prior to that time, on-going negotiations concerning the Karluk and Sturgeon rivers and adjacent lands or other potential habitat transactions result in habitat acquisition agreements that obligates some of these funds;

WHEREAS, absent such additional acquisition agreements, \$170 million is the total of the funds estimated to be available to support long-term restoration based on projected investment returns allowable through the Court Registry under its existing authority and thus reasonably anticipated as available for restoration purposes by the Trustee Council starting with FY 2003 ("estimated funds remaining on October 1, 2002"); and

WHEREAS, the limits of the existing investment authority of the Trustee Council have resulted in the loss of millions of dollars in potential earnings that would have been available to effectively address restoration needs in the future and support a comprehensive program that maintains its value over time, and it is necessary that the limits on the investment authority for the joint settlement funds be amended by Congress if we are to optimize our potential restoration program;

THEREFORE BE IT RESOLVED, that the Trustee Council has determined that recovery from the *Exxon Valdez* oil spill remains incomplete and there is need for establishing at this time a continuing long-term, comprehensive and balanced restoration program consistent with the *Restoration Plan*;

BE IT FURTHER RESOLVED, that funds in the Restoration Reserve and other remaining unobligated settlement funds available on October 1, 2002 (for expenditure starting in FY 2003) be allocated in the following manner consistent with the "Outline of Action Under Existing Authority" dated 3/1/99 attached to this resolution:

- \$55 million of the estimated funds remaining on October 1, 2002 and the associated earnings thereafter will be managed as a long-term funding source with a significant proportion of these funds to be used for small parcel habitat protection and it is recognized that any funding that may be authorized for purchase of lands along or adjacent to the Karluk or Sturgeon rivers or other potential habitat acquisitions would be made from within this allocation; and
- the remaining balance of funds on October 1, 2002 will be managed so that the annual earnings, estimated at approximately 5% per year, will be used to fund annual work plans that include a combination of research, monitoring, and general restoration including those kinds of community-based restoration efforts consistent with efforts that have been previously funded by the Trustee Council, such as subsistence restoration, Traditional Ecological Knowledge, Youth Area Watch, cooperative management, and local stewardship efforts, as well as local community participation in ongoing research efforts;

BE IT FURTHER RESOLVED, that the Restoration Office and the Chief Scientist, under the direction of the Executive Director, shall begin to develop a long-term research and monitoring program for the spill region that will inform and promote the full recovery and restoration, conservation and improved management of spill-area resources; and

BE IT FURTHER RESOLVED, that it is the intent of the Trustee Council that this long-term reserve for research, monitoring and general restoration be designed to ensure the conservation and protection of marine and coastal resources, ecosystems, and habitats in order to aid in the overall recovery of those resources injured by the *Exxon Valdez* oil spill and the long-term health and viability of the spill area marine environment;

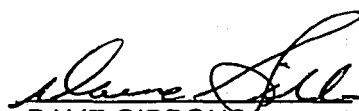

BE IT FURTHER RESOLVED, that in developing a long-term restoration research, monitoring and general restoration program for the spill region, the Executive Director shall solicit the views of the Public Advisory Group, community facilitators, resource management agencies, researchers and other public interests as well as coordinate restoration program efforts with other marine research initiatives including the North Pacific Research Board;


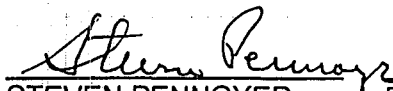
BE IT FURTHER RESOLVED, that the Executive Director shall work with the Alaska Congressional delegation and appropriate State and federal agencies to obtain the necessary investment authority to increase the earnings on remaining settlement funds, so that the Trustee Council will be able to conduct an effective restoration program that maintains its value over time; and

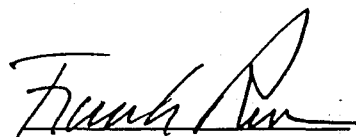
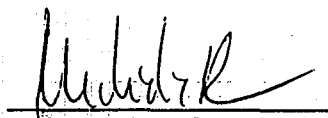
BE IT FURTHER RESOLVED, that in developing long-term implementation options for consideration by the Trustee Council, the Executive Director shall:

- investigate possible establishment of new or modified governance structures to implement long-term restoration efforts,
- explore alternative methods to ensure meaningful public participation in restoration decisions, and
- report back to the Trustee Council by September 1, 1999 regarding these efforts.

Adopted this 1st day of March, 1999, in Anchorage, Alaska.

	<u>3/15/99</u>	for		<u>3/9/99</u>
DAVE GIBBONS	Date		BRUCE M. BOTELHO	Date
Trustee Representative			Attorney General	
Alaska Region			State of Alaska	
USDA Forest Service				

	<u>3/11/99</u>			<u>3/15/99</u>
MARILYN HEIMAN	Date		STEVEN PENNOYER	Date
Special Assistant to the			Director, Alaska Region	
Secretary for Alaska			National Marine Fisheries Service	
U.S. Department of the Interior				

	<u>3.16.99</u>			<u>3/17/99</u>
FRANK RUE	Date		MICHELE BROWN	Date
Commissioner			Commissioner	
Alaska Department of			Alaska Department of	
Fish and Game			Environmental Conservation	

OUTLINE OF ACTION UNDER EXISTING AUTHORITY

Assumptions:

- Use of the Restoration Reserve funds will commence with FY 2003 (October 2002)
- The Trustee Council will allocate an additional \$36M to the Restoration Reserve (annual \$12M payments in FY 2000, 2001 and 2002)
- Additional restoration program authorizations from March 1999 to October 2002, exclusive of contractual land payments and other habitat commitments, will amount to not more than \$35M
- Remaining unobligated balance of restoration funds in October 2002 will be \$170M including funds that may be needed for a possible Koniag Karluk-Sturgeon acquisition
- Trustee Council receives no new investment authority and continues to invest settlement funds in treasury instruments that yield approximately 5%

Elements of a Long-Term Restoration Program:

- Consistent with the *Restoration Plan*, the core elements of a long-term restoration effort would focus on research, monitoring, and general restoration including community-based restoration, and habitat protection
- Starting in FY 2003, and except as otherwise approved by the Council for habitat protection, restoration efforts would be funded from the earnings of remaining funds
- Earnings estimated at approximately 5% per year from treasury investments (nominal yield)
- The approximately \$170M in restoration funds remaining on October 1, 2002 will be allocated into two parts:
 - ✓ \$55M for habitat protection, including a possible Koniag Karluk-Sturgeon acquisition and any other additional acquisitions approved by the Council prior to that date
 - ✓ remainder (estimated at \$115M plus, under the current assumptions) for research-monitoring, general restoration and community-based projects (e.g., subsistence, TEK, stewardship)
- Absent changes in the investment authority and consequent increased yield on investments, there would be no inflation-proofing with the consequent loss of purchase power over time in proportion to prevailing inflation rates (in order to support an annual restoration program of effective size)
- Cost of program management apportioned according to relative expense (public involvement, agency participation, peer review, habitat acquisition support, administration, etc.) to either the habitat or research, monitoring and general restoration funds as appropriate

Habitat Protection:

- \$55M of remaining funds on October 1, 2002 (FY 2003) for Habitat Protection would include any amounts needed to complete the Koniag Karluk-Sturgeon acquisition or other potential habitat protection purchases

- \$55M of the estimated funds remaining on October 1, 2002 and the associated earnings thereafter will be managed as a long-term funding source with a significant proportion of these funds to be used for small parcel habitat protection and it is recognized that any funding that may be authorized for purchase of lands along or adjacent to the Karluk or Sturgeon rivers or other potential habitat acquisitions would be made from within this allocation
- After December 2001 (the end of the current easement), the \$16.5M previously allocated for the Koniag Karluk-Sturgeon acquisition, if not obligated at that point, would be available for other habitat protection efforts
- Issues that require further consideration:
 - ✓ priority, criteria and decision-making process for specific parcel selection
 - ✓ possible role of non-governmental organization to implement program after October 2002
 - ✓ extent of public involvement in future program

Research, Monitoring and General Restoration:

- Remaining balance of funds (estimated at \$115M plus under the current assumptions) for Restoration Research, Monitoring, and General Restoration would be managed so that earnings-only would be used to support annual work plans starting with FY 2003
- Annual earnings currently estimated at 5% per year if within the U.S. Treasury (nominal yield, no inflation proofing)
- Annual work plan would support continuing restoration and enhancement of oil spill injured resources including long-term research-monitoring, development of improved management tools, synthesis of results, general restoration activities, and community-based restoration projects such as subsistence restoration, Traditional Ecological Knowledge, Youth Area Watch, cooperative management, and local stewardship efforts as well as local community participation in on-going research efforts
- Issues that require further consideration:
 - ✓ whether changes in the annual work plan process are appropriate in light of reduced scale
 - ✓ means and extent of scientific peer review
 - ✓ means and extent of public involvement in process
 - ✓ how and to what extent communities and tribes of the spill area would be involved in long-term research, monitoring, stewardship and cooperative management efforts
 - ✓ whether a new organization or governance structure is needed

3/1/99

Executive Director WORKING DRAFT Recommendation

SUMMARY OF PAST AND ESTIMATED FUTURE USES OF SETTLEMENT

(in \$millions)

REIMBURSEMENTS FOR SPILL RESPONSE	213.1
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RESTORATION MANAGEMENT	FFY 92-99	FFY 00-02	FFY 03+	
Science Management, Public Involvement & Administration	24.7	5.1	TBD	(a)

RESTORATION IMPLEMENTATION	FFY 92-99	FFY 00-02	Remaining Funds	(b)	TOTAL
Research, Monitoring, General Restoration	145.0	25.4	115.0		285.4 39.8%
Habitat Protection	372.1	4.5	55.0		431.6 60.2%
	517.1	29.9	170.0		717.0 100.0%

(a) To date, Restoration Office science management, public involvement and administration has cost approximately 5% of restoration program expenditures overall. Beyond FFY 02, science management, public involvement and administration costs will be allocated in proportion to program area costs.

(b) Estimate of remaining funds includes Restoration Reserve (with \$12 million per year to be placed into the reserve FFY 00 - FFY 02), interest accrued, the \$16.5 million committed to a Koniag purchase through 2001 plus additional funds currently unallocated.

Habitat Protection FFY 92-99

	Alaska	DOI	USFS	NOAA	Federal	Total
Large Parcel Acquisitions	164,938,339	138,294,839	40,097,515	0	178,392,354	343,330,692
Kachemak Bay	7,500,000				0	7,500,000
Afognak (80/20)	59,307,058	14,826,765			14,826,765	74,133,823
Seal Bay	39,549,334				0	39,549,334
Shuyak	42,000,000				0	42,000,000
Old Harbor		11,250,000			11,250,000	11,250,000
Eyak (10/90)	4,510,000	40,590,000			40,590,000	45,100,000
Tatitlek (10/90)	2,471,946		22,247,515		22,247,515	24,719,461
Orca Narrows			3,450,000		3,450,000	3,450,000
Chenega (40/60)	9,600,000		14,400,000		14,400,000	24,000,000
Akhiok-Kaguyak		36,000,000			36,000,000	36,000,000
Koniag		21,500,000			21,500,000	21,500,000
English Bay		14,128,074			14,128,074	14,128,074
Small Parcel Acquisitions	10,524,600	9,355,200	416,600	0	9,771,800	20,296,400
Acquisitions Completed	10,204,600	8,057,700	211,000		8,268,700	18,473,300
Acquisitions Pending	320,000	1,297,500	205,600	0	1,503,100	1,823,100
KAP 220 Mouth of Ayakulik River	80,000					
KAP 226 Karluk River Lagoon	240,000					
Tatitlek Homesites			205,600			
KEN 1052 Salamatof		33,500				
KAP 1089 R. Christensen (Larsen Bay)		13,000				
KAP 1090 D. Naumoff (Larsen Bay)		16,000				
KAP 1091 D. Easter (Larsen Bay)		18,000				
KAP 2012 Kodiak Island Borough (Larsen Bay)		12,000				
KAP 2026 M. Christensen (Larsen Bay)		13,000				
Larsen Bay Ten Acre Parcels		573,000				
KAP 95 Inga (Three Saints Bay)		84,000				
KAP 126 Christiansen (Three Saints Bay)		72,000				
KAP 134 Ignatin (Three Saints Bay)		72,300				
Sitkalidak Strait/Three Saints Bay Parcels		35,700				
Seven Tax Parcels		102,000				
Kodiak Island Tax Parcels		253,000				
Parcel Evaluation and Support Costs	2,888,893	1,218,796	4,410,070	0	5,628,866	8,517,759
TOTAL	178,351,832	148,868,835	44,924,185	0	193,793,020	372,144,851

Habitat Protection FFY 00-02

	Alaska	DOI	USFS	NOAA	Federal	Total
Small Parcel Acquisitions	2,991,800	0	1,000,000	0	1,000,000	3,991,800
Baycrest/Stariski Creek	500,000				0	500,000
Termination Point	1,865,000				0	1,865,000
Blondeau	626,800				0	626,800
Duck Flats/Jack Bay			1,000,000		1,000,000	1,000,000
Parcel Evaluation and Support Costs						500,000
FY 2000						300,000
FY 2001						200,000
TOTAL	2,991,800	0	1,000,000	0	1,000,000	4,491,800

Research, Monitoring and General Restoration FFY 92-99

Work Plans			108,606,247
FFY 1992 Work Plan	11,741,617		
FFY 1993 Work Plan	7,405,836		
FFY 1994 Work Plan	14,227,041		
FFY 1995 Work Plan	16,976,140		
FFY 1996 Work Plan	18,007,389		
FFY 1997 Work Plan	15,746,177		
FFY 1998 Work Plan	12,965,347		
FFY 1999 Work Plan (authorized)	11,536,700		
Special Projects			36,406,700
Alutiiq Museum	1,500,000		
Archaeological Repository/Exhibits	2,800,000		
Alaska SeaLife Center	26,225,600		
Port Graham Hatchery Reconstruction	781,300		
Reduction of Marine Pollution/Chenega Oiling	5,099,800		
TOTAL			145,012,947

Research, Monitoring and General Restoration FFY 00-02

Work Plans			24,000,000
FFY 2000 Work Plan	9,000,000		
FFY 2001 Work Plan	8,000,000		
FFY 2002 Work Plan	7,000,000		
Special Projects			1,400,000
Archaeological Repository/Exhibits (GA/Project Management)	100,000		
Reduction of Marine Pollution/Lower Cook Inlet	800,000		
Miscellaneous	500,000		
TOTAL			25,400,000

Science Management, Public Involvement and Administration FFY 92-99

Total			24,671,957
FFY 1992		4,295,933	
FFY 1993		2,653,889	
FFY 1994		4,082,492	
FFY 1995		3,209,548	
FFY 1996		2,995,607	
FFY 1997		2,650,858	
FFY 1998		2,287,930	
FFY 1999 (authorized)		2,495,700	

Science Management, Public Involvement and Administration FFY 00-02

Total			5,100,000
FFY 2000		2,100,000	
FFY 2001		1,500,000	
FFY 2002		1,500,000	

GEM Working Group

The GEM Working Group will be co-chaired by the Chief Scientist and Executive Director. Its primary members are the Scientific Coordinating Committee and several invited participants. Agency liaisons are invited to attend and observe and to assist in linking these planning efforts to agency needs and expertise.

Scientific Coordinating Committee

David Irons, USFWS, birds

Jim Bodkin, USGS, sea otters

Kathy Frost (or Lloyd Lowry), ADF&G, marine mammals

Jeep Rice, NMFS, marine fisheries & toxicology

Additional Invited Participants

John Piatt, USGS, birds

Gordon Kruse, ADF&G, shellfish & marine ecology

Hal Batchelder, UC Berkeley & GLOBEC, oceanography

Phil Mundy, consultant & core peer reviewer, fisheries management

Glenn Van Blaricom, UW, nearshore ecology

Henry Huntington, consultant, traditional knowledge

Co-Chairs

Robert Spies, AMS, marine ecology & toxicology

Molly McCammon, Restoration Office, natural resources management and policy

Liaisons & Staff

Claudia Slater and Bill Hauser, ADFG

Marianne See, ADEC

Carol Fries, ADNR

Ken Holbrook, USFS

Bruce Wright, NMFS

Catherine Berg, USFWS

Dede Bohn, USGS

Bud Rice, NPS

Hugh Short, Community Involvement Coordinator

**Preliminary Timetable for
GEM Planning and Implementation
FY 99-FY 03**

May-Sep 99	<ul style="list-style-type: none">-working group and agency input-initial stakeholder contacts
Jul 99	<ul style="list-style-type: none">-preliminary draft concept plan
Sep 99	<ul style="list-style-type: none">-draft concept plan presented to Trustee Council
Sep-Dec 99	<ul style="list-style-type: none">-public information and comment on draft concept plan-more agency input
Oct 99	<ul style="list-style-type: none">-initiate FY 00 transition projects: numerous proposals submitted on such topics as data management, planning process, and sampling protocols; some of these may be timely and appropriate in FY 00
Jan 00	<ul style="list-style-type: none">-revise draft concept plan based on public comment and agency input-give to NRC (if FY 00 proposal is funded)
Feb 00	<ul style="list-style-type: none">-prepare FY 01 Invitation; invite additional transition projects as needed
Jan 00-Jan 01	<ul style="list-style-type: none">-NRC review of draft concept plan-review results of FY 00 transition projects as results become available-initiate more detailed planning at level of sample designs & schedules
Oct 00	<ul style="list-style-type: none">-initiate FY 01 transition projects
Jan 01	<ul style="list-style-type: none">-informal, preliminary NRC feedback (though not yet formal report)-revisit basic content of plan as needed-begin revisions to GEM plan to address NRC recommendations, results of transition projects, etc.-continue detailed planning at level of sample designs & schedules
Feb 01	<ul style="list-style-type: none">-prepare FY 02 invitation; invite additional transition projects as needed
Oct 01	<ul style="list-style-type: none">-initiate FY 02 transition projects
Jan 02	<ul style="list-style-type: none">-begin final detailed revisions to long-term plan
Feb 02	<ul style="list-style-type: none">-prepare FY 03 invitation; invite implementation projects
Oct 02	<ul style="list-style-type: none">-implementation of GEM monitoring and research program

Gulf Ecosystem Monitoring (GEM) Program

Draft Outline for Long-Term Research, Monitoring, and General Restoration in the northern Gulf of Alaska FY2003 and beyond

I. Introduction

- A. Message from Executive Director or Trustee Council
 - 1. Purpose of document
 - 2. Relationship to November 1994 *Restoration Plan*
 - 3. Process, FY 00-02
 - 4. How to participate
- B. Vision for GEM and the northern Gulf of Alaska
 - 1. Importance of area
 - 2. Need for greater understanding as pressures on oceans increase
 - 3. Need for efficiency, coordination, interpretation and synthesis
 - 4. The opportunity
 - a. Tracking change on a century scale
 - b. Applications for management
 - c. Conservation and sustained use of renewable resources

II. Background

- A. Effects of the *Exxon Valdez* Oil Spill
 - 1. 1st decade
 - 2. Lingering
- B. EVOS Restoration Program
 - 1. Research, Monitoring and General Restoration, FY 92-02
 - 2. Decision on Restoration Reserve
- C. Context of Existing Agency Programs and Projects
[Must wait for Joe Sullivan's report; put in Appendix?]
 - 1. GLOBEC
 - 2. USFWS Seabird Monitoring Plan
 - 3. Etc.
- D. Issues, Concerns and Needs
 - 1. Lingering Effects of the EVOS
 - 2. Fisheries and ecosystem management
 - 3. Marine habitat protection
 - 4. Contaminants, water quality and watersheds; food safety

5. Community involvement, traditional knowledge, education and stewardship
6. Coordination, Synthesis and Information Transfer

III. Gulf Ecosystem Monitoring Program

A. Mission and Goals

1. Mission: *To foster a healthy and biologically diverse marine ecosystem in the northern Gulf of Alaska through greater understanding of how its productivity is influenced by natural changes and human activities.*
2. Goals
3. Geographic Scope

B. Overview of Structure and Approach

1. Long-term Monitoring
2. Shorter-term Focused Research
3. Local Stewardship
4. Science Management
5. Synthesis and Public Information

C. The Gulf of Alaska Ecosystem

1. Background
2. Conceptual Model: How the System Works
 - a. Introduction
 - b. The Model

D. Scientific Issues and Hypotheses

1. What information is needed for management and conservation?
2. Major scientific questions for GEM
 - a. Climate, sea-surface interactions and physical oceanography
 - b. Ocean fertility and plankton
 - c. Fish and fisheries
 - d. Benthic and intertidal communities
 - e. Bird and mammal populations
 - f. Anthropogenic and natural contaminants

E. Approach to Long-term Monitoring

1. Overview
2. Specific monitoring objectives
 - a. Climate
 - b. Physical oceanography
 - c. Chemical oceanography
 - d. Biological oceanography
 - e. Nekton

- f. Forage fish
- g. Other fish; [crustaceans?]
- h. Inshore benthic and intertidal communities
- i. APEX predators

F. Approach to Research

- 1. Overview
- 2. Types of projects to be carried out
 - a. Lingering injury from the oil spill
 - b. Exploring questions with or generated by monitoring data
 - c. Management and habitat protection

G. Approach to Traditional Knowledge and Community Involvement

H. Approach to Science Management

- 1. Principles and Policies (consistent with *Restoration Plan*)
- 2. Proposed elements of GEM science management
 - a. Scientific leadership and peer review
 - b. Process
 - c. Coordination with other programs and projects

I. Approach to Data management, Synthesis and Public Information and Involvement

- 1. Data Management
- 2. Synthesis

IV. Literature Cited

Planning for Long-Term Research and Monitoring Program

Project Number: 00630

Restoration Category: Research/Monitoring

Proposer: Restoration Office, *Exxon Valdez* Oil Spill Trustee Council

Lead Trustee Agency: Restoration Office (ADFG)

Cooperating Agencies: ADNR

Alaska SeaLife Center: No

Duration: 1st year of a 3-year project

Cost FY 00: \$84,700

Cost FY 01: \$50,000

Cost FY 02: \$25,000

Geographic Area: Entire oil-spill region

Injured Resource/Service: All injured resources and services

ABSTRACT

In March 1999 the Trustee Council agreed to dedicate \$115 million of Restoration Reserve funds in support of long-term monitoring and research in the spill area and adjacent northern Gulf of Alaska. Development of a draft plan for what is tentatively named the Gulf Ecosystem Monitoring (GEM) program was initiated in FY 99 and will continue through FY 02. In FY 00, the main steps will be to present a draft plan for comment by the general public and spill-area stakeholders, coordinate and refine the plan in association with such other large-scale programs as the U.S. Global Ocean Ecosystem Dynamics (GLOBEC) and the North Pacific Marine Science Organization (PICES), provide a revised draft plan for review by the National Research Council (see Project 00360), and contribute to development of the *FY 01 Invitation* which will request proposals for projects needed to accomplish the transition to the long-term program. This project will be accomplished through the combined efforts of the Restoration Office and Chief Scientist.

INTRODUCTION

In March 1999, the *Exxon Valdez* Oil Spill Trustee Council allocated at least \$115 million from the Restoration Reserve account in support of long-term research and monitoring in the northern Gulf of Alaska. Accordingly, the Restoration Office staff and representatives of Trustee agencies have begun to develop a plan for what is to be called the Gulf Ecosystem Monitoring (GEM) program, which will be designed to operate on a permanent basis. The mission of the GEM program is to foster a productive, healthy, and biologically diverse marine ecosystem in the northern Gulf of Alaska through greater understanding of how its marine productivity is influenced by natural changes and human activities. The goals of GEM are to: track lingering oil-spill injury, distinguish natural variability from human influences in the marine ecosystem, develop new fish and wildlife management tools, provide information on the status, trends, and health of fisheries and other marine resources, identify important marine habitats, foster efficiency through interagency coordination of monitoring and research activities, and promote local stewardship by and involvement of stakeholders.

It is anticipated that a first conceptual draft of the GEM plan will be available for public review and comment by September 30, 1999. During the years FY 00 through FY 02, this plan will be refined and become increasingly detailed, leading to the implementation of GEM in the field starting in FY 03 (October 0002). This Detailed Project Description describes the first of three years of planning activities leading toward implementation of GEM.

NEED FOR THE PROJECT

A. Statement of the Problem

Development of a successful GEM program is a complex undertaking, which has a number of aspects and requirements and which will go through several iterations. First, it is essential that the plan be based on input from biologists, oceanographers, and other scientists and from natural resource managers who are familiar with marine ecosystems, with the mechanics, problems, and applications of long-term ecological monitoring and research programs, and with existing agency and university monitoring and research programs and databases. Second, it is essential that stakeholders and the general public participate in designing the program and that they have confidence that implementation of GEM will lead to the sustained use and conservation of the northern Gulf of Alaska marine ecosystem. Finally, the GEM program must receive thorough independent peer review sufficiently in advance of implementation that it can be modified and improved in response to review comments and recommendations. In order to meet the goal of implementation in FY 03, it is necessary that progress be made toward satisfying these requirements in FY 00.

B. Rationale/Link to Restoration

In deciding to allocate a significant portion of the Restoration Reserve for long-term monitoring and research, the Trustee Council explicitly recognized that complete recovery from the oil spill will not occur for decades and that through long-term observation and, as needed, restoration actions, injured resources and services could be fully restored. The Trustee Council further recognized that conservation and improved management of these resources and services will require a substantial ongoing investment to improve understanding of the biology and marine and coastal ecosystems that support the services as well as the people of the spill region. Hence, the Trustee Council made a commitment to development of a long-term research and monitoring program for the spill region that will inform and promote the full recovery and restoration, conservation, and improved management of spill-area resources.

C. Location

Monitoring and research carried out under the GEM program will take place mostly in the coastal and marine environment within the oil-spill area, and, to the extent necessary, in adjacent parts of the northern Gulf of Alaska. Most of the planning activities described in this proposal will take place in Anchorage and in spill-area communities.

COMMUNITY INVOLVEMENT AND TRADITIONAL ECOLOGICAL KNOWLEDGE

The decision by the Trustee Council to use a significant portion of funds in the Restoration Reserve for long-term research and monitoring was made after extensive public review and comment, including meetings in most spill-area communities, in FY 98 and 99. The Trustee Council's Community Involvement Coordinator (Project \052) and an expert in traditional ecological knowledge have participated in early discussions which will lead to a first draft of the GEM plan. In FY 00, a series of visits to spill-area communities, public meetings, and meetings with stakeholders will further involve the public in development of GEM. In addition, one of the purposes of GEM is to involve communities in gathering data and other information, including local and traditional knowledge, that contribute to understanding of the spill-area ecosystem.

PROJECT DESIGN

A. Objectives

The mission of the GEM program is to foster a productive, healthy, and biologically diverse marine ecosystem in the northern Gulf of Alaska through greater understanding of how its marine productivity is influenced by natural changes and human activities. Accordingly, the goal of this project is to design a common-sense, scientifically rigorous, cost-effective program ready for implementation in FY 03. Specific objectives are to:

- (1) present a conceptual draft GEM plan to the public and various stakeholders for review,

discussion, and comment;

(2) consult and coordinate with biologists, oceanographers, and other scientists, especially those involved with prior or ongoing agency and university research and monitoring programs, plans, projects, and databases in the Gulf of Alaska and north Pacific Ocean;

(3) obtain independent peer review of one or more versions of the draft GEM plan;

(4) through FY 01 and 02 *Invitations to Submit Proposals* and other means (e.g., contracts), conduct projects to obtain information and advice needed to plan for and accomplish the transition to the long-term program; and

(5) prepare a final GEM plan and contribute to development of the *FY 03 Invitation to Submit Proposals* to invite proposals to implement the plan starting in FY 03.

B. Methods

The methods described below are organized by project objective and only pertain to activities proposed to be carried out in FY 00:

(1) Present plan to the public. A conceptual draft of the GEM plan should be ready for public review, discussion, and comment by September 30, 1999. When that draft is available, the Restoration Office staff will schedule a series of briefings for the general public and for various stakeholders (e.g., fishing and environmental organizations, regional citizen advisory councils, local communities). The purpose of the briefings will be to increase awareness of the GEM plan and to obtain feedback on the plan and how to improve it. These meetings, which will be carried out primarily during October and November 1999, will draw on various combinations of Restoration Office and agency staff under the leadership of the Trustee Council's executive director and chief scientist. In addition to printing the draft GEM plan, fulfilling this objective may require development of additional materials (e.g., audio-visuals, brochures or booklets) to aid in public review of the plan.

(2) Consult with scientists. Once a conceptual draft of the GEM plan is complete, it will be necessary to gather additional information that will enable more detailed versions of the plan to be developed. For example, the final version of the plan will need to include specific information on samples and measurements to be obtained and the locations and timing of field work. It also will be necessary to have detailed information about ongoing data gathering efforts so that GEM can be tailored to complement and take advantage of ongoing work, thus achieving greater scientific integration, applicability to management needs, cost savings, and efficiency. The needed background information will be obtained primarily through a series of consultations between the Trustee Council's chief scientist or science coordinator and individual scientists, especially those involved in or experienced with prior or ongoing large-scale monitoring and research programs and projects in the northern Gulf of Alaska or the north Pacific ocean (e.g.,

GLOBEC, PICES, FOCI). These consultations, which will mostly take place during October through December, will include meetings with agency natural resource managers to help ensure that results from GEM will help address managers' needs for marine ecological information.

(3) Independent peer review. It is essential that appropriate versions of the GEM plan are subjected to independent peer review. Such reviews will be used to improve the scope and content of the plan, plus enhance its profile and credibility nationally. The needed reviews will be accomplished in two ways. First, the Trustee Council's team of "core" peer reviewers will review the draft plan or specific aspects of the draft plan as requested by the chief scientist. Second, it is anticipated that the National Research Council's (NRC) Polar Research Board and Board on Environmental Science and Technology will be invited to review a draft of GEM starting in January 2000 (see Project 00360). This January 2000 draft would be revised from the September 1999 draft to take into account feedback from the public, stakeholders, the scientific community, and natural resource management agencies. If the NRC review is funded, a special review panel will be convened in FY 00 and a published report and recommendations will be produced in FY 01. Throughout this process, the Trustee Council's executive director and science coordinator will serve as the primary liaisons to the NRC staff and review panel. The chief scientist will assist in this process as needed.

(4) Transition Projects. The *FY 00 Invitation to Submit Proposals* invited proposals that would assist in the transition to a long-term research and monitoring program. Several such proposals were submitted and some of them may be funded in FY 00. Examples of the types of work needed are development of efficient monitoring protocols for seabird productivity, harbor seal population trends, and data management. The *FY 01 Invitation*, which is scheduled to be printed in February 2000, will need to include a similar--but probably more detailed--request. Development of the appropriate request will require considerable effort and will specifically require additional consultation by Restoration Office staff with the chief scientist and core peer-review team. This probably will be accomplished in conjunction with the FY 00 Restoration Workshop, which is scheduled for late January 2000.

There may be need for additional time-sensitive small projects outside of the annual work plan cycle. An example of such a project would be a preliminary consultation with a statistician in regard to the overall sampling design of the monitoring component of GEM. Information of this type may be accomplished through contracts from the Restoration Office.

(5) Final Plan Development. This objective will be addressed in FY 02.

C. Cooperating Agencies, Contracts, and Other Agency Assistance

Representatives of all Trustee agencies have been or will be involved in some way in developing the draft GEM plan, in presenting it to the public, or in refining future versions of it. In addition to a direct role in developing the GEM plan, agency representatives will be involved in the continuing process of identifying and describing prior and existing monitoring and research

programs, plans, projects, and databases relevant to the northern Gulf of Alaska. There may be need for one or more small personal services contracts to obtain timely information needed in the further development of the GEM plan (e.g., with a statistician in regard to the overall sampling design of GEM monitoring).

Beyond the participation of Trustee agencies, there will be consultations with other institutions and programs involved in monitoring and research in the north Pacific Ocean. These include, for example, the North Pacific Marine Science Organization (PICES) and the Global Oceans Ecosystems Dynamics (GLOBEC) Northeast Pacific project, which is sponsored jointly by the National Science Foundation and National Oceanic and Atmospheric Administration.

SCHEDULE

A. Measurable Project Tasks for FY 00

- | | |
|-----------------|--|
| October 1999 | <ul style="list-style-type: none">-Print and release conceptual draft of GEM to public-Produce any supplementary materials needed for public presentations-Begin series of stakeholder and public meetings in spill-area communities-Continue technical consultations with agency and academic contacts-Interact with National Research Council (NRC) staff to facilitate implementation of Project 00360, if funded-Formal presentation of the GEM plan to the Public Advisory Group and Trustee Council |
| November | <ul style="list-style-type: none">-Conclude first round of stakeholder and public meetings |
| December | <ul style="list-style-type: none">-Conclude preliminary technical consultations with agency and academic contacts-As needed, enter into small contracts for personal services to address key, time-sensitive information gaps |
| January | <ul style="list-style-type: none">-Prepare revised draft of GEM plan and circulate to core peer reviewers-Address peer review comments and revise draft plan as needed-Present revised draft conceptual plan to NRC and facilitate their review by providing other background materials, briefings, etc.-Meet with core peer reviewers at Restoration Workshop to discuss transition projects to be requested in the <i>FY 01 Invitation to Submit Proposals</i> |
| February | <ul style="list-style-type: none">-Print and distribute <i>FY 01 Invitation to Submit Proposals</i> |
| March-September | <ul style="list-style-type: none">-Continue interactions with NRC staff and review panel as needed-Continue consultations with stakeholders and scientific and agency contacts as needed to further develop contact of GEM plan |

B. Project Milestones and Endpoints

Progress toward project objectives in FY 00 will be completed according to the schedule above. The following overall milestones are key:

February 01	-Print and distribute <i>FY 02 Invitation to Submit Proposals</i> , which will request a final series of transition projects prior to GEM implementation
Spring	-Publication of NRC report and recommendations (if Project 00360 is funded)
	-Review and consideration of NRC report and recommendations
Summer	-Prepare revised draft GEM plan, incorporating NRC comments and additional technical detail as deemed appropriate and necessary
February 02	-Print and distribute <i>FY 03 Invitation to Submit Proposals</i> , which will request projects for implementation of GEM plan in FY 03
March-September	-Prepare, print, and distribute final version of GEM plan

PUBLICATIONS AND REPORTS

There will be no annual report on FY 00 activities. The primary product in FY 00 will be the revised draft conceptual GEM plan presented to the NRC in January 2000.

PROFESSIONAL CONFERENCES

There is need for travel support for meetings and consultations in spill-area communities and at other localities as needed for scientific and agency contacts. No presentations are anticipated at professional conferences, although opportunities may arise to create awareness about the GEM program at key scientific gatherings.

NORMAL AGENCY MANAGEMENT

The Trustee Council directed the executive director and chief scientist to develop a plan for long-term monitoring and research (i.e., GEM) in a resolution adopted on March 1, 1999, in regard to the expenditure of Restoration Reserve funds. In addition, public information and participation is an explicit requirement of the October 1991 settlement. Thus, this project is something that is appropriately carried out by the Restoration Office.

COORDINATION AND INTEGRATION OF RESTORATION EFFORT

This project will be fully coordinated with and among Trustee agencies, scientific peer reviewers, the Public Advisory Group, and others. Part of the January 2000 Restoration Workshop will be devoted to briefing principal investigators and others on the status of the GEM plan.

Development of the GEM program represents the streamlining and integration of the current restoration program into a form that can be sustained on a multi-decadal time scale.

PROPOSED PRINCIPAL INVESTIGATOR

Molly McCammon, Executive Director
Exxon Valdez Oil Spill Trustee Council
645 G Street, Suite 401
Anchorage, Alaska 99501
907-278-8012
907-276-7178 (fax)
<mollym@oilspill.state.ak.us>

Dr. Robert Spies, Chief Scientist
Exxon Valdez Oil Spill Trustee Council
Applied Marine Sciences
4749 Bennett Drive, Suite L
Livermore, California 94550
925-373-7142
925-373-7834 (fax)
<spies@amarine.com>

PRINCIPAL INVESTIGATOR

Ms. McCammon has 25 years of experience in Alaska in recreation and tourism, journalism, communications, and public policy, emphasizing natural resource issues. She has been executive director of the Trustee Council since 1994.

Dr. Spies has 35 years of experience as a scientist in marine pollution and toxicology, the effects of petroleum on marine organisms, and benthic ecology. He is president of Applied Marine Sciences, Inc. and has been the Trustee Council's chief scientist since 1991.

OTHER KEY PERSONNEL

Science Coordinator (to be named)
Exxon Valdez Oil Spill Trustee Council
645 G Street, Suite 401
Anchorage, Alaska 99501
907-278-8012
907-276-7178 (fax)

2000 EXXON VALDEZ TRUSTEE COUNCIL PROJECT BUDGET

October 1, 1999 - September 30, 2000

Budget Category:	Authorized FY 1999	Proposed FY 2000	PROPOSED FY 2000 TRUSTEE AGENCIES TOTALS					
			ADEC	ADF&G	ADNR	USFS	DOI	NOAA
				\$20.5	\$64.2			
Personnel	\$0.0	\$0.0						
Travel	\$0.0	\$15.0						
Contractual	\$0.0	\$60.0						
Commodities	\$0.0	\$5.5						
Equipment	\$0.0	\$0.0	LONG RANGE FUNDING REQUIREMENTS					
Subtotal	\$0.0	\$80.5			Estimated FY 2001	Estimated FY 2002		
General Administration	\$0.0	\$4.2						
Project Total	\$0.0	\$84.7			\$50.0	\$25.0		
Full-time Equivalents (FTE)								
			Dollar amounts are shown in thousands of dollars.					
Other Resources								

Comments:

FY00

Prepared: 7/7/99

Project Number: 00630
 Project Title: Planning for Long-Term Research & Monitoring
 Program
 Lead Agency: ADFG/Restoration Office

**FORM 2A
 MULTI-TRUSTEE
 AGENCY
 SUMMARY**

2000 EXXON VALDEZ TRUSTEE COUNCIL PROJECT BUDGET

October 1, 1999 - September 30, 2000

Budget Category:	Authorized FY 1999	Proposed FY 2000						
Personnel		\$0.0						
Travel		\$15.0						
Contractual		\$0.0						
Commodities		\$5.5						
Equipment		\$0.0	LONG RANGE FUNDING REQUIREMENTS					
Subtotal	\$0.0	\$20.5			Estimated FY 2001	Estimated FY 2002		
General Administration		\$0.0						
Project Total	\$0.0	\$20.5						
Full-time Equivalents (FTE)		0.0						
Dollar amounts are shown in thousands of dollars.								
Other Resources								

Comments:

FY00

Prepared: 7/7/99

Project Number: 00630
 Project Title: Planning for Long-Term Research & Monitoring
 Program
 Agency: ADFG / Restoration Office

**FORM 3A
 TRUSTEE
 AGENCY
 SUMMARY**

2000 EXXON VALDEZ TRUSTEE COUNCIL PROJECT BUDGET

October 1, 1999 - September 30, 2000

Personnel Costs:		GS/Range/ Step	Months Budgeted	Monthly Costs	Overtime	Proposed FY 2000
Name	Position Description					
						0.0
						0.0
						0.0
						0.0
						0.0
						0.0
						0.0
						0.0
						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 2000
Description						
Travel for Restoration Office staff and other personnel as needed for National Research Council review sessions and public/ stakeholder presentation meetings.						15.0
						0.0
						0.0
						0.0
						0.0
						0.0
						0.0
						0.0
						0.0
						0.0
						0.0
						0.0
Travel Total						\$15.0

FY00

Prepared: 7/7/99

Project Number: 00630
 Project Title: Planning for Long-Term Research & Monitoring Program
 Agency: ADFG / Restoration Office

FORM 3B
 Personnel
 & Travel
 DETAIL

October 1, 1999 - September 30, 2000

FORM 3B
Contractual &
Commodities
DETAIL

4 of 9

2000 EXXON VALDEZ TRUSTEE COUNCIL PROJECT BUDGET

October 1, 1999 - September 30, 2000

[illegible]

FY00

Project Number: 00630
Project Title: Planning for Long-Term Research & Monitoring Program
Agency: ADFG

FORM 3B
Equipment
DETAIL

Prepared: 7/7/99

2000 EXXON VALDEZ TRUSTEE COUNCIL PROJECT BUDGET

October 1, 1999 - September 30, 2000

Budget Category:	Authorized FY 1999	Proposed FY 2000							
Personnel		\$0.0							
Travel		\$0.0							
Contractual		\$60.0							
Commodities		\$0.0							
Equipment		\$0.0							
Subtotal	\$0.0	\$60.0	LONG RANGE FUNDING REQUIREMENTS						
General Administration		\$4.2			Estimated FY 2001	Estimated FY 2002			
Project Total	\$0.0	\$64.2							
Full-time Equivalents (FTE)		0.0							
Dollar amounts are shown in thousands of dollars.									
Other Resources									
Comments:									

FY00

Prepared: 7/7/99

Project Number: 00630

Project Title: Planning for Long-Term Research & Monitoring
Program

Agency: ADNR

**FORM 3A
TRUSTEE
AGENCY
SUMMARY**

2000 EXXON VALDEZ TRUSTEE COUNCIL PROJECT BUDGET

October 1, 1999 - September 30, 2000

Personnel Costs:		GS/Range/ Step	Months Budgeted	Monthly Costs	Overtime	Proposed FY 2000
Name	Position Description					
						0.0
						0.0
						0.0
						0.0
						0.0
						0.0
						0.0
						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 2000
Description						
						0.0
						0.0
						0.0
						0.0
						0.0
						0.0
						0.0
						0.0
						0.0
						0.0
						0.0
Travel Total						\$0.0

FY00

Prepared: 7/7/99

Project Number: 00630
 Project Title: Planning for Long-Term Research & Monitoring
 Program
 Agency: ADNR

FORM 3B
 Personnel
 & Travel
 DETAIL

October 1, 1999 - September 30, 2000

FY00

FORM 3B
**Contractual &
Commodities**
DETAIL

8 of 9

October 1, 1999 - September 30, 2000

FY00

FORM 3B
Equipment
DETAIL

9 of 9