



Exxon Valdez Oil Spill Trustee Council
General Restoration, Habitat Enhancement, Habitat Protection, and Facilities Projects
Quarterly Project Reporting Form

**Detailed instructions for each section below are given in Section II. Quarterly Project Reports in the Reporting Policy on the website, <https://evostc.state.ak.us/policies-procedures/reporting-procedures/>*

Project Number: 23220608

Project Title: Port Graham Habitat Enhancement Project

Principal Investigator(s):

Jon E. Shepherd - Port Graham Corporation (PGC)

Kyle Graham - U.S. Fish and Wildlife Service (USFWS)

Nathan Lojewski - Chugachmiut

Patrick Norman - Native Village of Port Graham (PGVC)

Reporting Periods and Due Dates:

<i>Reporting Period</i>	<i>Due Date</i>
February, March, April	June 1
May, June, July	September 1
August, September, October	December 1
November, December, January	March 1

Submission Date: June 1, September 1, December 1, or March 1

Project Website: NA

Please check all the boxes that apply to the current reporting period.

Project progress is on schedule.

Project progress is delayed

Budget reallocation request.

Personnel changes.

N/A all principal investigators remain actively involved in project planning and implementation.



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1. Summary of Work Performed:

Activities in Q1 through Q3 of 2023 included site visits, partner meetings, and initial road work. In Q1 the Port Graham Corporation (PGC) Restoration team developed the 2023 scope of work in conjunction with the US Fish and Wildlife Service (USFWS), continued to design for culvert replacements, connected with additional partners, and shared progress with community shareholders. In June and July 2023 USFWS, along with Natural Resources Conservation Service (NRCS) and Alaska Department of Fish and Game (ADFG) Habitat Division staff, visited Port Graham and viewed proposed culvert replacement sites. During the site visit USFWS staff assisted ADFG with fish surveys on a subset of the proposed site streams with unknown fish presence. The PGC construction crew initiated brush clearing in Q2 and completed Initial brush clearing of the road to Rocky Bay Lodge in Q3. Other Q3 activities included road clearing and stabilization, ditching, planning for 2024 construction activities, and further collaboration and coordination between project partners. Road clearing was completed in October 2023, followed by ongoing ditch clearing and bank stabilization work on the main road. Initial work for bridge replacement began on three of the four bridges under the Tribal Transportation Program. This work, while not funded under this project, mutually works to support the goals of PGC and the Native Village of Port Graham to restore access to the road. USFWS staff met with the PGC Project Coordinator and the E-Terra group in Q3 to discuss project direction and data needs. Stream crossings were prioritized by the USFWS, and the list was shared with PGC for approval (Figure 1). USFWS hired a lead project biologist for the Port Graham EVOS project at the end of Q3 2023.

Work conducted in Q4 (November 2023 through January 2024) focused on strengthening communications between project partners and continuing efforts of the previous quarters. In Q4 USFWS project staff established monthly meetings with PGC, contractors, and other partners. Meetings primarily focused on logistics for Windy Bay culvert site construction planned for summer 2024. USFWS and Port Graham project staff discussed construction logistics, including determining details such as equipment needs, culvert ordering, dewatering plans and pumps, construction oversight needs and scheduling. Significant time and effort are being put into finding ways to continue grow the skills and capacity of the PGC construction crew. This included discussions for additional coordination and collaboration for innovative designs, assisting in risk management, supporting constructability analysis, and evaluating contractor alternatives. Additional meeting topics included site prioritization for future culvert replacements, cooperative agreement amendments, and drafting of contracts for design development and construction oversight. USFWS project staff also continue to complete additional agency trainings required for the professional development and project management.



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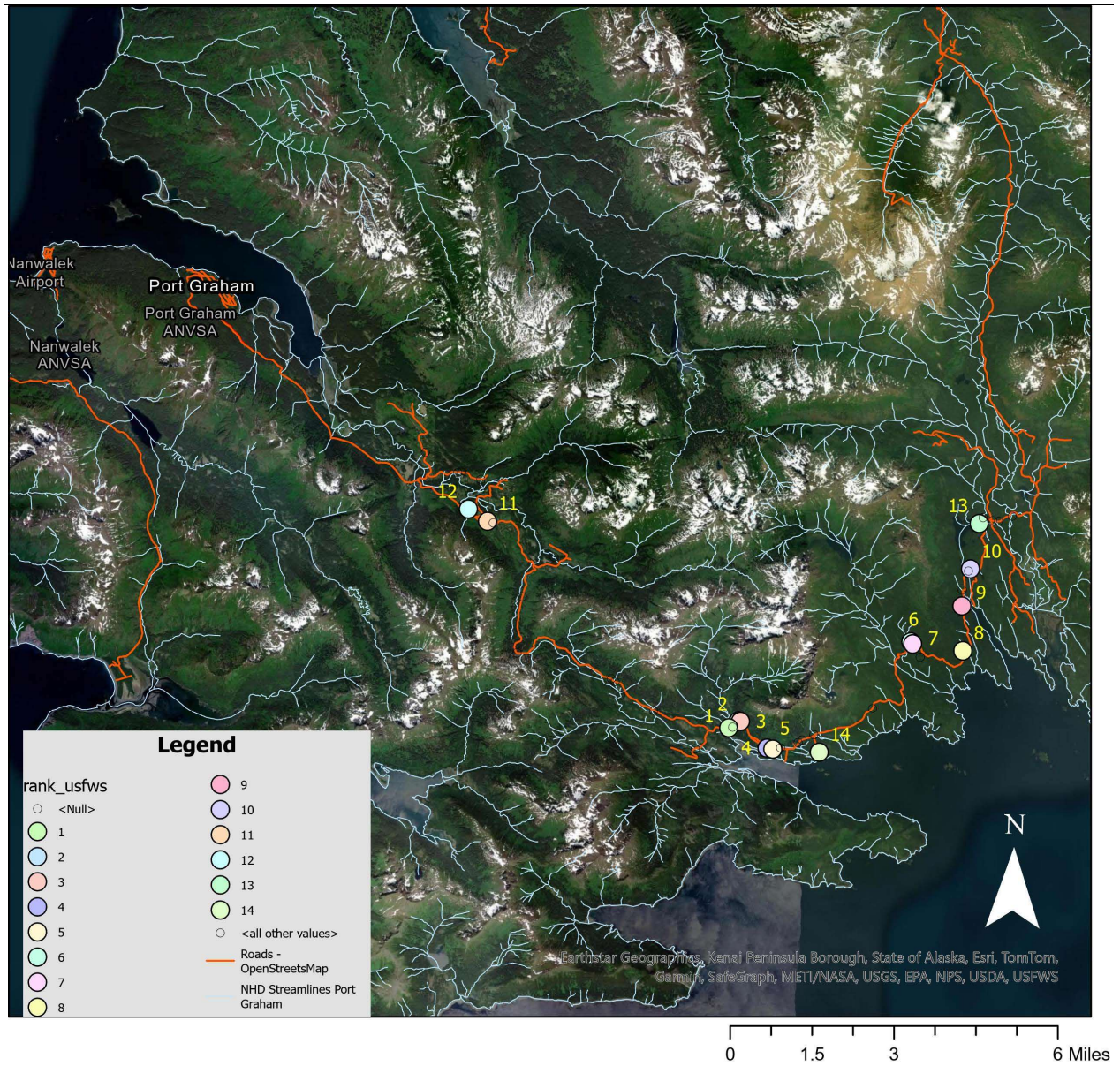


Figure 1. Map of culverts ranked by priority for design and construction as of February 2024.



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Planned FY 2024 activities include development of contracts for culvert crossing designs and continued coordination efforts and planning between partners for the 2024 construction season. Construction on the Windy Bay culvert (see Figure 2) is scheduled to start in summer 2024. Three bridges between Port Graham and the Windy Bay site are scheduled for replacement in summer 2024, under the Tribal Transportation Program. The replacement of these bridges will significantly improve safe access to the remaining 11 miles of road to the Rocky Bay Lodge. An all-partners meeting is scheduled for March 2024, and a community information meeting is planned for spring 2024. USFWS staff plan to meet monthly with the Port Graham Project Coordinator and staff through early 2024 to coordinate efforts and assist where needed.

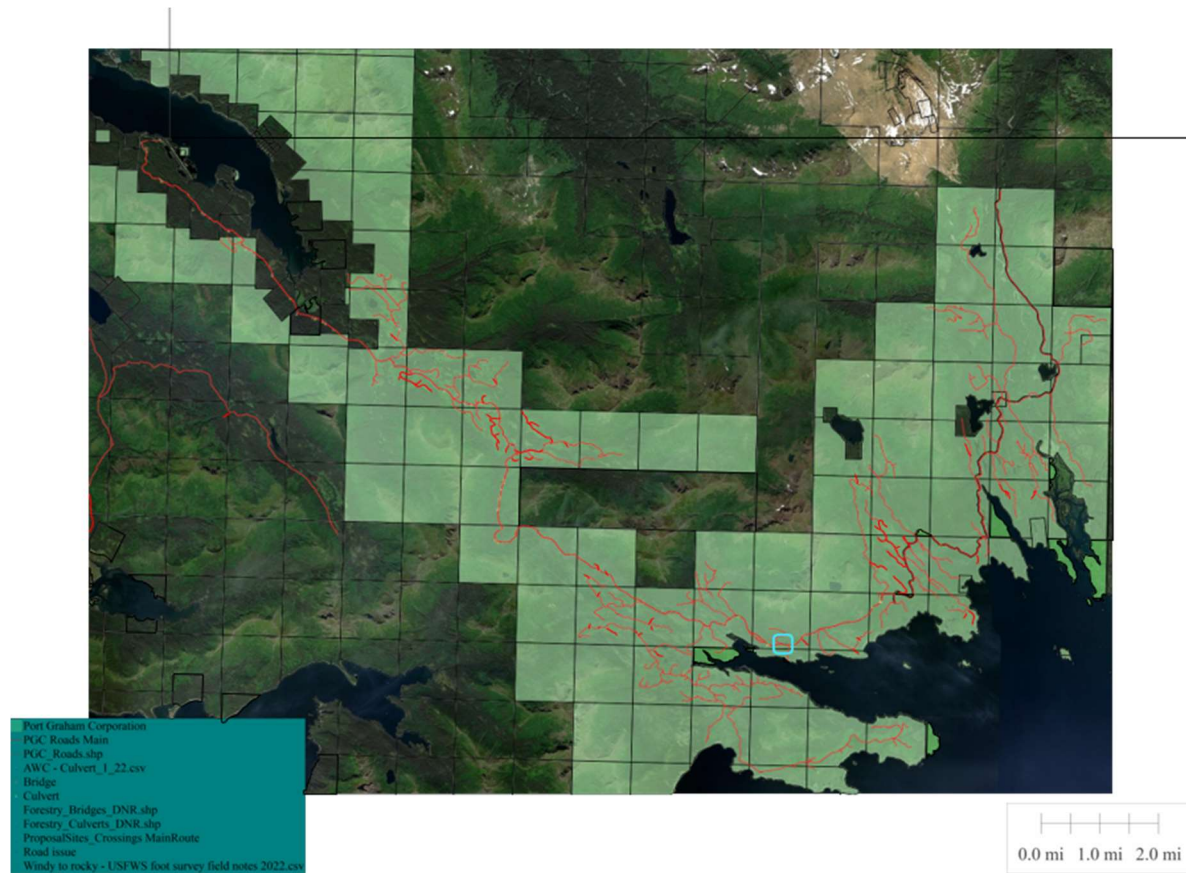


Figure 2: Road Overview and location of 2024 Windy Bay stream crossing construction project (circled in blue)



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The following bulleted list and table outline the plan and progress for year two (2) and FY23 Q4 in detail.

Scope of work for year (2) of the project as outlined in statement of work (Amendment 1):

1. Communications
 - a. Continue an operational partnership with Port Graham, USFWS, and partners.
 - b. Continue communications with Port Graham.
 - i. Discussions with staff from the Port Graham Village Tribal Council.
 - ii. Public meetings as needed in Port Graham, Alaska.
2. Clear roads of vegetation and debris.
 - a. Complete brush clearing, shoulder stabilization, and road assessment.
 - b. Scoping and prioritization work for engineering assessment.
3. Perform temporary road maintenance as needed to support clearing roads.
4. Oversee the survey and design stream crossings and develop a prioritization plan.
5. Repair, replace, or remove two stream crossings (note – activity moved to 2024).

Table 1. Tasks and deliverables.

Task	Deliverables FY23	Progress Through Q4 2023	Expected completion dates
Coordinate partner planning meetings	<ul style="list-style-type: none"> • Monthly meeting minutes • Two community meetings • Operational partnership with USFWS 	<ul style="list-style-type: none"> • Monthly meetings between USFWS and PGC completed and ongoing • Final comments provided by USFWS to HDR on Windy Bay Stream Crossing design. Construction planned for 2024. • Comments provided by USFWS for permits for 2024 Windy Bay construction. • PG, PGC community meeting with USFWS planned for early 2024. 	All project years, ongoing
Project management	<ul style="list-style-type: none"> • Logistical coordination between project partners • Hire USFWS project manager and assign existing task roles 	<ul style="list-style-type: none"> • Open and frequent communication maintained between USFWS and PGC project officers. • Lead Project Biologist hired by USFWS in October 2023. • USFWS Project Staff attended required trainings (e.g., contract management and financial assistance) through January 2024. 	All project years, ongoing



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Task	Deliverables FY23	Progress Through Q4 2023	Expected completion dates
Road Assessment	<ul style="list-style-type: none"> • Images and maps of road system • Updated road condition report • Project prioritization plan • Site assessment reports on the currently inaccessible Windy and Rocky Bay roads 	<ul style="list-style-type: none"> • 100% of initial road assessment completed by PGC as of summer 2023. • Data shared amongst all project partners, ongoing. • PGC has website data portal available and data sharing is active and ongoing. • USFWS and PGC discussed site prioritization plan in fall 2023 for future crossing sites. • USFWS initiated development of engineering and design contracts for prioritized project sites in late 2023 and will continue into 2024. 	Ongoing, on track
Clear roads of vegetation and debris – to Windy Bay	<ul style="list-style-type: none"> • Access to sites for construction years • Access for Native Village of Port Graham community members and project staff and equipment. 	<ul style="list-style-type: none"> • 100% clearing of vegetation performed by PGC staff as of fall 2023. • Clearing of brush along road shoulder and ditches ongoing. • Shoulder grading and stabilization ongoing. 	Brush clearing completed on main road between Port Graham and Rocky Bay
Culvert replacement or removal for fish passage	<ul style="list-style-type: none"> • Project site prioritization list • Identify, survey, and design project sites • Future funding proposals 	<ul style="list-style-type: none"> • 7 sites surveyed. • 1 site at 100%, 6 sites at 35% design • 1 culvert replacement to be completed during the FY24 season. • Additional design work on remaining sites planned, and contracting process initiated by USFWS. • Initial discussions with NRCS for application for EQUIP Program funding. 	All project years, ongoing



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2. Abstract:

Work conducted in Q4 (November 2023 to January 2024) was a continuation of efforts in the previous quarter with advances made in project coordination and initial road work and assessment. PGC continued road improvements and roadside vegetation removal until the snowpack made site access impossible. In Q4 the Port Graham Corporation and USFWS Habitat Restoration team met to continue the discussion on data needs, data sharing, project coordination, and prioritization. USFWS met with PGC project staff at least once per month during Q4, with email and phone correspondence in-between meetings. PGC and USFWS staff discussed future project site prioritization, construction and support needs for the 2024 Windy Bay culvert replacement project, and overall project progress. Significant progress was made towards planning for the 2024 summer construction season, including determining details such as equipment needs, culvert ordering, dewatering plans and pump needs, and construction oversight needs and schedules.

3. Coordination and Collaboration:

In FY23, the USFWS, PGC, the Native Village of Port Graham (NVPG), Chugachmiut, Natural Resource Conservation Service (NRCS), worked together to achieve fieldwork objectives, select priority stream crossings, and develop plans for the 2024 field season. In Q4 2023, all project partners continued to work together to achieve project goals and objectives.

PGC and USFWS project managers met monthly through Q4 to discuss project progress, next steps, and data needs. Additionally, coordination meetings with A/E firms WJA and HDR, RP Kinney, and others associated with design work have been occurring monthly to keep construction planning on track. Monthly meetings between PGC and USFWS will continue into FY24. An all-partners meeting is scheduled for March 2024 and a Port Graham community meeting is planned for early summer 2024.

The partnership is intentionally and strategically collaborating with NVPG about the ongoing bridge construction replacing three bridges utilizing the Tribal Transportation program with the Federal Highways Program. The partnership is strategically selecting sites and dividing project objectives to avoid duplication and promote strategic fiscal and logistical efficiency.

In Q4 USFWS continued coordination with the NRCS and began discussing how the Environmental Qualities Incentive Program (EQIP) can support the mutually identified goals and objectives.

4. Response to EVOSTC Review, Recommendations and Comments:

No comments currently.



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5. Budget:

Table 2. Project Budget.

Budget Category:	Proposed FY 22	Proposed FY 23	Proposed FY 24	Proposed FY 25	Proposed FY 26	5- YR TOTAL PROPOSED	QUARTERLY EXPENDETURES	ACTUAL CUMULATIVE
Personnel	\$ 39,640.00	\$ 39,640.00	\$ 39,640.00	\$ 39,640.00	\$ 39,640.00	\$ 198,200.00	\$ 1,823.38	\$ 18,401.32
Travel	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 15,000.00	\$ 2,171.16	\$ 4,820.87
Contractual	\$ 1,791,722.39	\$ 1,333,006.79	\$ 1,333,006.79	\$ 874,291.00	\$ 579,876.00	\$ 5,911,902.97	\$ -	\$ 2,772,472.03
Commodities	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 2,500.00	\$ -	\$ 1,147.82
Equipment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Indirect Costs Rate =	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SUBTOTAL	\$ 1,834,862.39	\$ 1,376,146.79	\$ 1,376,146.79	\$ 917,431.00	\$ 623,016.00	\$ 6,127,602.97	\$ 3,994.54	\$ 2,796,842.04
General Administration (9% of subtotal)	\$ 165,137.62	\$ 123,853.21	\$ 123,853.21	\$ 82,568.79	\$ 56,071.44	\$ 551,484.27	\$ -	\$ -
PROJECT TOTAL	\$ 2,000,000.01	\$ 1,500,000.00	\$ 1,500,000.00	\$ 999,999.79	\$ 679,087.44	\$ 6,679,087.24	\$ -	\$ 2,796,842.04
Other Resources (In-Kind Funds)	\$ 450,000.00	\$ 1,767,376.00	\$ 1,767,376.00	\$ -	\$ -	\$ 3,984,752.00	\$ -	\$ -

The USFWS uses the cooperative agreement process to develop annual budgets, scope of work, and accountability for project objectives and financial management. The “contractual” column represents the current cooperative agreement between the USFWS and PGC and the contract developed for survey and design for road washouts and stream crossings.

Most expenditures in Q4 of 2023 were salary, and travel (see Appendix 2 for a quarterly summary of expenses and corresponding line items for all FY23). The travel expenditures reported in Q4 occurred earlier in summer 2023 (Q2) but were not reported until Q4 due to USFWS internal accounting practices. Personnel activities included USFWS personnel attending partner meetings, providing technical assistance, and developing cooperative agreements, amendments, and contracts for FY24. PGC had a very successful quarter organizing data, planning project activities, and coordinating partners.

USFWS project staff conducted an audit of FY22 reported expenses in Q4 of FY23. The adjusted values are reported in Table 2. An explanation of the audit decisions is available in a budget analysis memo (see Appendix 2). The budget analysis memo was shared with EVOS program staff in February 2024. The USFWS staff submitted a No Cost Extension form to EVOS to roll \$414,167.14 of unspent funds into FY24.

Activities in FY24 will focus on developing contracts for design work, culvert construction and support at Windy Bay, and continued partnership building between USFWS, PGC, and partners. New project staff at USFWS will also be conducting an audit of all expenditures in early FY24 to be able to track and forecast spending throughout the lifespan of this award.



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Appendix 1: Detailed FY23 Expenditures

Table 3. Summary of quarterly expenditures for FY23.

Budget Category:	Proposed FY 23 Budget	Q1 Feb-April	Q2 May-July	Q3 Aug-Oct	Q4 Nov-Jan(2024)	FY23 Total Expense	Cumulative Expense to Date FY22 Expense + FY23 Expense
Personnel	\$ 39,640.00	\$ -	\$ -	\$ -	\$ 1,823.38	\$ 1,823.38	\$ 18,401.32
Travel	\$ 3,000.00	\$ -	\$ -	\$ 302.50	\$ 2,171.16	\$ 2,473.66	\$ 4,820.87
Contractual	\$ 1,333,006.79	\$ -	\$ 1,902,139.46	\$ 141,690.53	\$ -	\$ 2,043,829.99	\$ 2,772,472.03
Commodities	\$ 500.00	\$ -	\$ -	\$ 129.99	\$ -	\$ 129.99	\$ 1,147.82
Equipment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SUBTOTAL	\$ 1,376,146.79	\$ -	\$ 1,902,139.46	\$ 142,123.02	\$ 3,994.54	\$ 2,048,257.02	\$ 2,796,842.04

Table 4. Itemized list of FY23 expenditures and the quarter reporting occurred. Dates reflect the post date by USFWS Finance. A line item dated by USFWS Finance may have been reported in a different system (e.g., DOI Financial Business Management System) at an earlier date and therefore was reported in an earlier quarter.

Itemized List						
Category	Fiscal Year	Date	Quarter Reported	Expense	Personnel	
Contractual	2023	Unknown	2	\$ 729,286.22	PCG	
Contractual	2023	9/14/2023	2	\$ 479,876.25	PGC	
Contractual	2023	8/23/2023	2	\$ 692,976.99	PGC	
Contractual	2023	9/12/2023	3	\$ 141,690.53	Windy Bay Services I	
Commodities	2023	8/29/2023	3	\$ 129.99	GRAHAM	
Travel	2023	8/9/2023	3	\$ -	#	
Travel	2023	8/7/2023	3	\$ 302.50	#	
Labor	2023	Multiple	4	\$ 1,823.38	Multiple	
Travel	2023	2/6/2024	4	\$ 43.95	FITZPATRICK	
Travel	2023	2/6/2024	4	\$ 43.95	DEKKER	
Travel	2023	2/6/2024	4	\$ 43.95	DEKKER	
Travel	2023	2/6/2024	4	\$ 43.95	FITZPATRICK	
Travel	2023	2/6/2024	4	\$ 43.95	DEKKER	
Travel	2023	2/6/2024	4	\$ 43.95	FITZPATRICK	
Travel	2023	2/6/2024	4	\$ 14.50	DEKKER	
Travel	2023	2/6/2024	4	\$ 490.01	FITZPATRICK	
Travel	2023	2/6/2024	4	\$ 490.01	DEKKER	
Travel	2023	2/6/2024	4	\$ 30.00	FITZPATRICK	
Travel	2023	2/6/2024	4	\$ 216.00	DEKKER	
Travel	2023	2/6/2024	4	\$ 216.00	FITZPATRICK	
Travel	2023	2/6/2024	4	\$ -	#	
Travel	2023	2/6/2024	4	\$ 445.00	DEKKER	
Travel	2023	12/20/2023	4	\$ -	#	
Travel	2023	12/18/2023	4	\$ 5.94	#	



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Appendix 2: Budget Analysis Memo

FY22 EVOS Port Graham Budget Rebalance

In February 2024 the USFWS EVOS staff conducted an audit of FY22 budget balances for the Port Graham Habitat Enhancement Project. This exercise began initially to understand the current expenses to the project with the goals of projecting the balance forwards. However, we discovered that in FY22 Q3 some inaccurate accounting had been reported. Current USFWS project staff are submitting a revised budget summary to date with the updated FY22 numbers for the consideration of the EVOS board.

Background

The initial FY22 Q3 reporting was conducted during a period of staff turnover; both the project biologist and the budget analyst left their respective positions in 2022. These roles were unfilled for multiple months, and reporting tasks fell to various staff members. The two project staff biologist positions were later filled in FY23 (June and October) while the division budget analyst position remains unfilled.

In January 2024, the project biologist noticed discrepancies in reported budget numbers and requested a budget summary from the financial department to include an in-depth review of all project spending to date. Numbers from previous quarterly reports to EVOS did not match most recent numbers provided by financial staff at USFWS, particularly for FY22 where expenditures were overreported. This discrepancy is attributed to the overturn of project biologist, absence of a division budget analyst, and changes to the USFWS financial reporting systems that occurred over this period. Because this discrepancy was not noticed until now, these inaccurate cumulative expenses have been propagated forwards with every reporting period until now. We would now like to correct the record and state the accurate cumulative expenses for budget categories.

Resolution

In FY22 Q3 the following ‘Actual Cumulative’ Totals were reported inaccurately (see Table 1). The internal audit of the FY22 budget is presented in the column ‘Audit Cumulative’, along with the difference between the reported and revised totals:

Table 5. FY22 budget totals for the Port Graham Habitat Enhancement Project

Budget Category	FY22 Pre-Audit Original Cumulative Expenditures	FY22 Post-Audit Cumulative Expenditures	Pre- and Post-Audit FY22 Difference
Personnel	\$32,476.00	\$16,577.94	-\$15,898.45
Travel	\$5,521.00	\$2,347.21	-\$3,173.61
Contractual	\$728,642.00	\$738,358.00	\$9,715.96
Commodities	\$1,111.00	\$1,017.83	-\$93.17



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The resulting FY23 Q4 totals are as follows:

Table 6. Actual cumulative expenses through Q4 FY23 (i.e., project start through January 2024).

Budget Category	FY23 Post-Audit Cumulative (FY22+FY23) Expenditures
Personnel	\$18,401.32
Travel	\$4,820.87
Contractual	\$2,772,472.03
Commodities	\$1,147.82

The remaining balance in each budget category after the completion of FY22 and FY23 are as follows:

Table 7. Actual cumulative expenditures through Q4 of FY23, and the remaining balance (difference) between the post-audit and proposed FY22 and FY23 budgets.

	Proposed FY22 Budget	Proposed FY23 Budget	Post-Audit Cumulative FY22+FY23 Expenditures	Remaining Funds through FY23 Q4
Personnel	\$39,640.00	\$39,640.00	\$18,401.32	\$60,878.68
Travel	\$3,000.00	\$3,000.00	\$4,820.87	\$1,533.13
Contractual	\$1,791,722.39	\$1,333,006.79	\$2,772,472.03	\$352,257.15
Commodities	\$500.00	\$500.00	\$1,147.82	(-\$147.82)
TOTAL	\$1,834,862.39	\$1,376,146.79	\$2,796,842.04	\$414,521.14