

## 2005 Strategic Plan Executive Summary

The mission of the Great Lakes Fishery Trust is to provide funding to enhance, protect, and rehabilitate the Great Lakes fishery. The trust will manage its resources to compensate for the lost use and enjoyment of the Lake Michigan fishery resulting from the operation of the Ludington Pumped Storage Plant.

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# Overview of the GLFT

## BACKGROUND

The Great Lakes Fishery Trust was created in May 1996 to compensate the residents of Michigan for the lost use and enjoyment of the fishery resources of Lake Michigan caused by the operation of the Ludington Pumped Storage Plant (LPSP), located in Ludington, Michigan.

In 1973, Consumers Energy (formerly Consumers Power Company) and the Detroit Edison Company began commercial operation of the LPSP. The jointly owned hydroelectric generating facility draws water from Lake Michigan into an upland reservoir through large, reversible pump-turbines during periods of low electric demand and generates power by discharging water from the reservoir during periods of peak demand.

## THE CREATION OF THE TRUST

By 1986, it had become apparent that the plant's operations were causing fish losses. When the utilities were unable to implement effective barriers to prevent fish losses at the facility as required under their Federal Energy Regulatory Commission (FERC) license, the Michigan United Conservation Clubs (MUCC) and the National Wildlife Federation (NWF) initiated legal actions. The State of Michigan also intervened in the federal licensing proceeding to require installation of devices to minimize future fish losses, and filed a separate action in state court seeking compensation for fish losses.

After nearly ten years of legal proceedings and negotiations, MUCC, NWF, the U.S. Department of the Interior, and several Indian tribes joined the state of Michigan in a comprehensive settlement with the utilities. The complex settlement involves several components, including the installation of seasonal barrier nets to reduce future losses of fish at the facility, compensation for past damage to fish, and payments for unavoidable future losses that will occur. In exchange, the utilities are authorized to operate the facility under a federal license that expires in 2019.

The settlement agreement approved by the court and a companion agreement approved by the FERC provided for (1) the transfer of approximately 7,000 acres of utility-owned lands for incorporation into the public lands of the Huron Manistee National Forest within the Au Sable, Muskegon, and Manistee river watersheds for public use; (2) construction of Great Lakes public fishing access facilities at several locations; and (3) the creation of a trust (Great Lakes Fishery Trust) to receive additional lands (3,000 acres) and cash payments to compensate for past and future fish losses. The assets from the sale of the transferred lands were used to establish the corpus for the GLFT's mitigation project grants.

## USES OF THE GLFT

GLFT grant funds awarded under the agreement give preference to Lake Michigan projects with a focus on the following activities:

- Research directed at increasing the benefits associated with Great Lakes fishery resources
- Rehabilitation of lake trout, lake sturgeon, and other fish populations
- Protection and enhancement of fisheries habitat, including Great Lakes wetlands
- Public education concerning the Great Lakes fisheries

- Acquisition of real property for the above purposes, or to provide access to the Great Lakes fisheries

Under the terms of the settlement, the GLFT trustees are also authorized to grant funds for other purposes consistent with the types of projects outlined above.

## GLFT MEMBERS

The GLFT is administered by a six-member Board of Trustees representing parties to the settlement (see the Appendix for a listing of board members). The Michigan Department of Natural Resources (MDNR) Director is the permanent chair of the board.

The Scientific Advisory Team (SAT) is composed of representatives of the organizations serving on the GLFT Board of Trustees (except for the Michigan Department of Attorney General) and includes representatives from Consumers Energy and the Detroit Edison Company, the Chippewa Ottawa Resource Authority, and one representative selected by mutual agreement of the National Wildlife Federation, the Michigan United Conservations Clubs, and the MDNR. As its name implies, the SAT plays an advisory role to the GLFT, but also has some independent responsibilities with respect to overseeing and approving certain technical provisions of the FERC license requirements for the LPSP and fish-loss prevention strategies. A list of SAT members is provided in the Appendix.

The GLFT is a private, nonprofit corporation operating independently of the public agencies, Indian tribes, or private conservation organizations that make up its board of trustees. Using funds derived from the settlement, the GLFT contracts for its administrative and management support services through a private firm, Public Sector Consultants Inc., located in Lansing, Michigan.

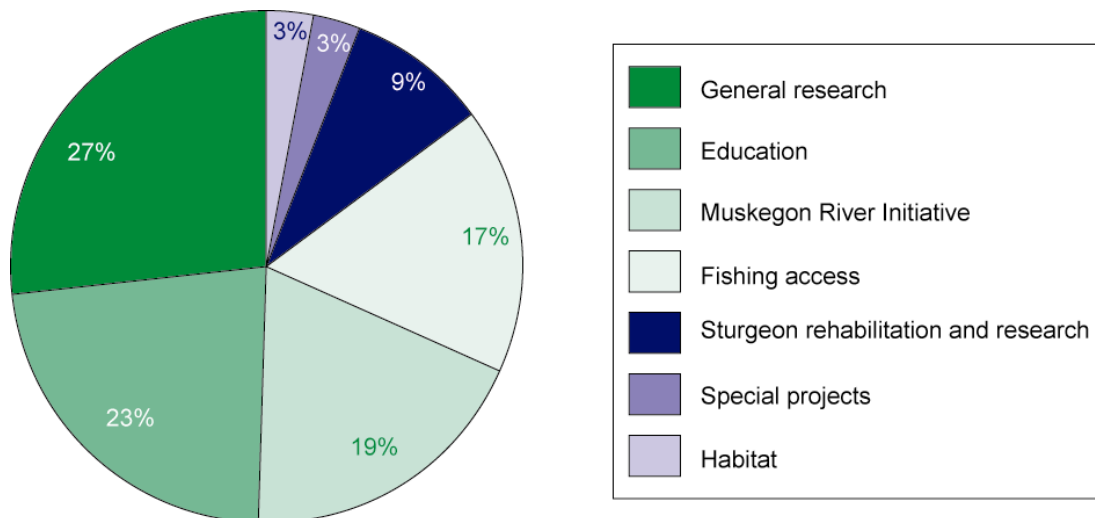
# Accomplishments to Date

The GLFT has liquidated all but one 30-acre parcel of the 10,000 acres of land it received under the settlement and has invested the revenue received to support its grant programs. The proceeds from the land sales, in addition to the original and annual fish damage payments, have been invested in the corpus of the trust, which at the end of 2004 exceeded 23 million dollars. GLFT grants over the last seven years to mitigate the fish losses topped 26 million dollars by the end of 2004.

Funded grant projects and related activities have focused on the types of projects specifically identified in the settlement. The GLFT has worked cooperatively with research institutions; state, tribal, and federal management agencies; regional authorities; and private foundations to maximize the effectiveness of its grant programs and to encourage collaboration to address issues of common concern. The GLFT has used a variety of approaches to solicit proposals for funding. Requests for proposals are sent to potentially interested parties around the Great Lakes via mail, e-mail, and Web-based listservs. An online application system for proposals is now used for all grant solicitations. The GLFT has also contributed resources to seminars, forums, and conferences to encourage collaboration and transfer of information on the Great Lakes fishery and ecosystem among researchers, managers, funders, and stakeholders.

By 2020, the year of the last fish loss payment by the utilities under their current license, the GLFT is expected to have invested approximately \$100 million in mitigation projects to protect and restore the Great Lakes fishery. Exhibit 1 identifies the percentage of grants awarded since 1998 by category.

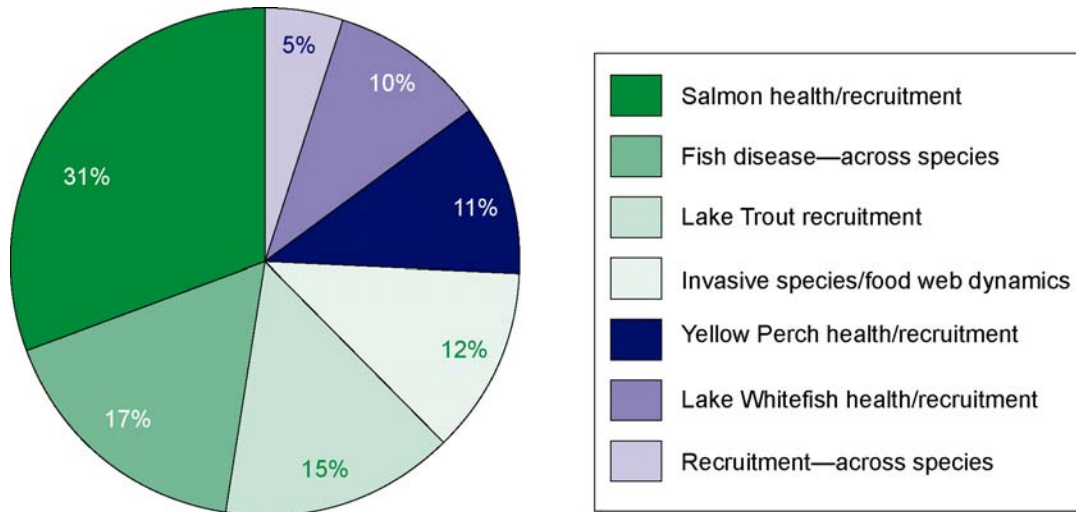
**EXHIBIT 1**  
Grant Awards (\$26,083,789 total) 1998–2004, by Category



SOURCE: GLFT.

There are subcategories or focus areas within the general fisheries research grants category. The distribution of grant funds expended in this category since 1998 is shown in Exhibit 2.

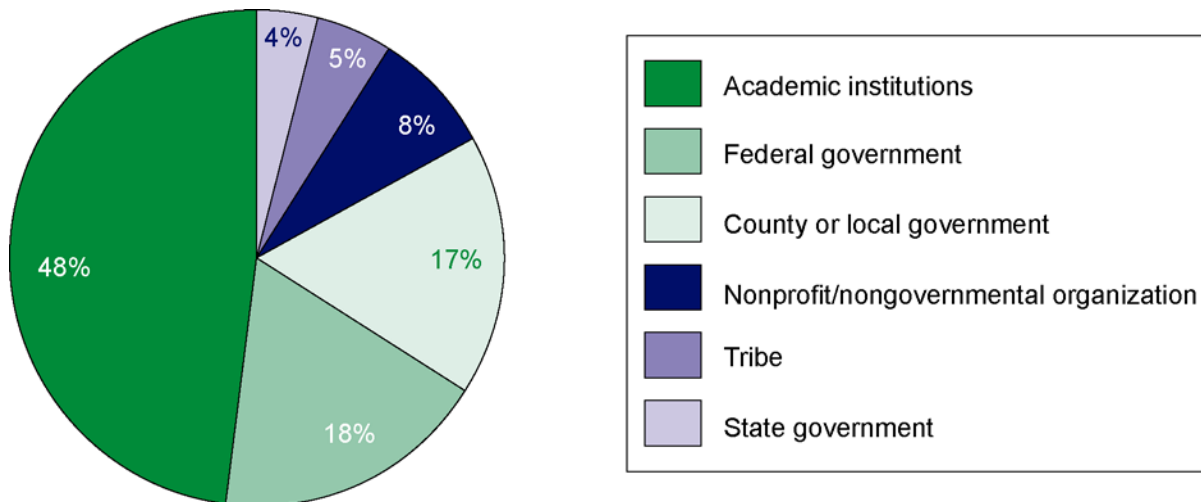
**EXHIBIT 2**  
General Research Focus Areas, 1998–2004



SOURCE: GLFT.

Because of the GLFT’s focus on research, nearly half of the GLFT total grant funds were awarded to academic institutions. The distribution of grantees (1998–2004) is shown in Exhibit 3.

**EXHIBIT 3**  
GLFT Grantees, 1998–2004



SOURCE: GLFT.

# Strategic Operations

## MISSION STATEMENT

The mission of the Great Lakes Fishery Trust is to provide funding to enhance, protect, and rehabilitate Great Lakes fishery resources. The GLFT will manage its resources to compensate for lost use and enjoyment of the Lake Michigan fishery resulting from operation of the Ludington Pumped Storage Plant.

## VISION STATEMENT

The Great Lakes Fishery Trust is an innovative funding source created to compensate the residents of the State of Michigan for the lost use and enjoyment of fisheries resources of Lake Michigan resulting from the operation of the Ludington Pumped Storage Plant.

The GLFT envisions the Great Lakes as supporting a sustainable and diverse fishery that meets the needs of the Great Lakes community for a healthy environment, wholesome food, recreation, employment, commerce, and preservation of its cultural heritage. The GLFT will dedicate its assets to fostering realization of this vision, particularly for Lake Michigan.

The guiding principle of the GLFT is to consider the total environment, recognizing the connections among the chemical, physical, and biological processes of the Great Lakes ecosystem as well as the human uses and values associated with this magnificent resource. The GLFT recognizes that public understanding of, and involvement in, Great Lakes fishery management is essential to successfully attaining its objectives.

## PAST PLANNING

The GLFT has been through several rounds of strategic planning. The first plan (1996—1999) set the course for a newly created organization by providing the vision, mission, and goals based upon its legal mandate, as well as the basic organization structure and operating policies. This 1996–1999 plan also set forth short-term objectives and timelines for the implementation of its grant programs.

In evaluating its goals against this first plan, the GLFT board and SAT produced a 2000 update of the strategic plan. The updated plan modified the long-term goals and short-term objectives of the GLFT, and established a continuous evaluation process that included periodic evaluations and updates of the strategic plan—the first of which would occur by early 2005. As part of the 2000 update, the GLFT emphasized the need for partnerships, collaboration, and cooperation among grantees and with other public and private organizations that have similar interests in enhanced management of the Great Lakes fishery.

By 2003, the GLFT had met most of its short-term objectives established in the 2000 update and initiated a year-long evaluation and strategic planning process to chart the future course of the GLFT and its grant programs. This strategic planning initiative focused less on the “how-tos” and more on what outcomes the GLFT hopes to accomplish with its grant programs by 2020.

## CHARTING A COURSE FOR THE FUTURE

Since its inception, the GLFT has relied on the five categories mandated within the settlement agreement's language for its grants to nonprofit organizations, educational institutions, and government agencies:

- Fishing access development for shore-based angling and tribal fishing access, including land acquisition and site enhancement
- Education relating to the Great Lakes fishery
- Research on the Great Lakes fishery, with special emphasis on lake sturgeon
- Fishery habitat protection and restoration, with special emphasis on the Muskegon River
- Special projects

This 2005 GLFT Strategic Plan reflects the importance of a holistic, ecosystem approach to Great Lakes management that focuses on desired outcomes and realistically assesses the role and capabilities of the GLFT. The focus of the GLFT will be on activities that best complement the actions of other organizations that share a common vision. In short, this plan identifies the GLFT niche in Great Lakes fishery enhancement efforts that will allow it to optimize the investment of its resources and support the contributions of others. This approach is consistent with the GLFT legal mandate, incorporates the specific research, education, population rehabilitation, habitat and fishing access activities identified in the settlement agreement, and encourages innovative approaches, collaborative projects, and funding partnerships.

In the future, the GLFT may modify its goals and objectives to encompass broader research, management, or education topics based upon improved information, emerging issues, or identified special needs. The goals and objectives for the GLFT are divided into three primary sections for organizational purposes, recognizing that there are unavoidable overlaps between categories developed under any strategic funding plan due to the complex nature of the fishery and the Great Lakes ecosystem. The three broad categories developed to guide the Great Lakes Fishery Trust grant programs are

- access to the fishery
- ecosystem health and sustainable fish populations, and
- Great Lakes stewardship.

The GLFT believes that an important attribute of its work is to maintain the flexibility to fund proposals outside of its routine, regularly scheduled, competitive grant programs to assure timely response to critical issues affecting the Great Lakes ecosystem. The GLFT is one of a limited number of organizations that can quickly seize unique opportunities to enhance the fishery, educate the public, protect valuable habitat, and secure critical fishing access. In order to accommodate this unique attribute, the GLFT has created an avenue to review "special case" proposals or special projects. To gain consideration as a special project, the proposed activity must (1) generally fall outside of a request for proposal (RFP) process, and (2) be "nominated" by a board member willing to advocate for the proposal before the board. The GLFT has a policy that governs the review and approval of special projects.

These three focus areas are discussed in the following sections.

# Access to the Great Lakes Fishery

## HISTORY

The GLFT has granted over six million dollars for 32 fishing access–related projects since 1998, including grants to 22 governmental units, two tribes, one intertribal agency, and three nonprofit organizations. Of these projects, 28 have created or contributed to the construction or improvement of shore-based fishing structures on Michigan’s Great Lakes shoreline. A majority of the projects have involved projects located along the Lake Michigan shoreline in Michigan’s Lower Peninsula. Three projects have involved improved tribal fishing access in the 1836 Treaty fishing waters. In addition to the capital projects, the GLFT has funded the development and distribution of a fishing access guide, *Let’s Fish Lake Michigan*, and three feasibility studies of access development potential (along the Lower Peninsula shore of Lake Michigan, the Detroit River, and within 1836 Treaty tribal fishing areas).

## STRATEGIC PRIORITIES

The overarching access goal is to provide access to the Great Lakes fishery for shore-based angling and tribal fishing. Consistent with this goal, the GLFT will use its resources to support activities to accomplish the targeted outcomes, as outlined in Exhibit 4.

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### EXHIBIT 4

#### Activities and Outcomes, Access to the Fishery

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#### Activities: What we do

##### **Create recreational fishing access opportunities by:**

- Providing grants to increase shore-based fishing access along the Lower Peninsula shore of Lake Michigan and lower portions of major tributaries that are consistent with our funding criteria and identified as having potential by the GLFT access assessment,
- Assessing access site construction potential of the UP shore of Lake Michigan and lower portions of major tributaries, as well as the Michigan shore of other Great Lakes and lower tributaries, and providing grants to increase shore-based fishing consistent with this assessment and funding criteria, and
- Assessing land acquisition potential along the Michigan shore of Lake Michigan that would accommodate access site development.

**Remove or provide passage around barriers** that prevent Great Lakes fish species from using river segments where both habitat protection benefits and high-value angling opportunities are created for migratory Great Lakes species.

Continuously **educate anglers** on the availability of shore-based Great Lakes fishing opportunities in Michigan by:

- Producing and distributing information about access opportunities in fishing guides, magazine articles, circulars, paid media, and/or other continuous distribution media, and
- Developing partnerships with and providing promotional materials to MUCC, MDNR, Sea Grant, tribes, and others who have contact with anglers.

In areas where high-value, shore-based Great Lakes angling opportunities could be created, **educate communities and public agencies** about the funding available through the GLFT.

**Promote the availability of and provide upon request technical assistance to communities and public agencies** in areas where high-value, shore-based Great Lakes angling opportunities exist, but where lack of resources prohibits development of high-quality projects.

**Create tribal fishing access opportunities by:**

- Providing grants to increase tribal fishing access consistent with the CORA assessment, our funding criteria, and the 2000 consent decree, and
- Addressing barriers to the development of tribal access sites.

Continuously **educate tribal members** on the availability of tribal fishing opportunities in Michigan by developing promotional materials and distributing them directly to tribal members and by developing partnerships with tribes and others who have contact with tribal fishermen to assist in dissemination.

## **Outcomes: What we hope to accomplish**

Enhanced shore-based Great Lakes recreational and tribal angling opportunities are created through capital improvements and/or land acquisition where:

- A viable sport fishery is present,
- Physical conditions of a site are appropriate,
- There are no other access opportunities nearby,
- The site will be maintained and user regulations enforced,
- Growth/development pressure is occurring,
- The incidence of negative impacts on habitat associated with fishing in unimproved locations can be reduced,
- Potential for use is high,
- The cost of the project is commensurate with access benefits to be provided,
- Tribal and recreational fishing opportunities are jointly provided,
- Educational messages aligned with the GLFT mission and goals are displayed, and/or
- Timing is critical.

All jurisdictions on the Michigan shoreline of Lake Michigan with suitable site conditions have a public access site.

# Ecosystem Health and Sustainable Fish Populations

## HISTORY

The interagency management of fishery resources in the Great Lakes was formalized in *A Joint Strategic Plan for Management of the Great Lakes Fisheries* (Joint Plan) ratified by the federal, state, provincial, and tribal resource management agencies in the 1980s under the auspices of the Great Lakes Fishery Commission. The Joint Plan placed responsibility for implementing a consensus approach to fish-community management with the individual lake committees. The lake committees represent all fishery resource management agencies with management responsibilities on each of the Great Lakes and include lakewide citizen advisory bodies. The members of the Lake Michigan Committee adopted the *Fish-Community Objectives for Lake Michigan* in 1995. This document contains consensus recommendations on goals and objectives for the Lake Michigan fish community. It has been periodically revised as new information and concerns have arisen.

The GLFT board and SAT members represent either the agencies involved in the development of the *Fish Community Objectives for Lake Michigan* or the GLFT constituent organizations that provided advice. The GLFT goals and related grant outcomes are consistent with the Lake Michigan fish community objectives and the GLFT has adopted by reference the consensus concepts of management included in the Joint Plan. The GLFT will focus its attention on identifying specific GLFT activities and grant outcomes that support the *Fish-Community Objectives for Lake Michigan* and the Joint Plan.

## STRATEGIC PRIORITIES

### *Long-Term Goal*

Restore and assist in the maintenance of biological integrity of the Lake Michigan fish community so that production of desirable fish is sustainable and ecologically efficient. Consistent with this goal, the GLFT will use its resources to support activities to accomplish the targeted outcomes shown in Exhibit 5.

## EXHIBIT 5

### Activities and Outcomes, Ecosystem Health and Sustainable Fish Populations

#### Activities: What we do

- Provide funding for **projects that have direct management implications** (e.g., applied research or development/enhancement of management tools) rather than for basic research or for ongoing management activities (e.g., hatchery production or routine monitoring)
- Support basic research only when there is a clear consensus that such efforts are essential to address a **critical issue facing fishery managers**
- Encourage **collaborative projects** among researchers and between management organizations to address high priority issues

Specifically, the GLFT will support:

- Research and related management activities consistent with the goals identified in the Lake Michigan Fish-Community Objectives
- Habitat assessment, inventory, and classification
- Innovative research leading to prevention of the introduction of invasive species in the Great Lakes
- Innovative projects intended to lead to effective means to limit the range and/or abundance of invasive species already present in the Great Lakes
- Coordinated GLFT funding activities through the development of partnerships with other public and private funders (e.g., Sea Grant, Great Lakes Fishery Commission, and private foundations) to minimize duplication of effort, assure that funded projects are complementary, and address issues that require the combined resources of several entities
- Participation of grantees, as well as management staff and SAT members, in seminars, symposia, and similar activities to ensure broad dissemination of GLFT project results to Great Lakes researchers, management agencies, and stakeholders
- An accessible repository for GLFT-funded research results through the GLFT website and through its cooperative agreement with the Institute of Fisheries Research (MDNR/U of M)
- Research that models critical ecosystem components essential to sustainable population management of the most valued species
- Research and analysis that documents the contribution (economic, environmental, and/or social) of various elements of the fishery

#### Outcomes: What we hope to accomplish

##### Interim Results:

##### Lake Sturgeon

- Identify existing spawning populations
- Identify distinct genetic populations
- Provide evidence of successful enhancement of existing population
- Provide evidence of successful reintroduction in historically important river system or river segment

##### Lake Trout

- Successfully demonstrate means to attract spawning population to historically productive reefs
- Provide evidence of significant natural reproduction in Lake Michigan
- Document role of specific cause(s) in reproductive/recruitment failures
- Identify specific strains that can successfully reproduce in Lake Michigan

### **Fish Health**

- Identify methods of transmission, detection, potential controls, and other management implications of major diseases such as BKD and EMS
- Establish methods and protocols to detect and assess the implications of new fish diseases discovered in Great Lakes

### **Non-Salmonid Recruitment**

- Identify causes responsible for declining populations and potential management responses

### **Salmonid Recruitment**

- Create new methods to better assess contribution of natural recruitment to adult populations

### **Salmonid Forage Base**

- Provide meaningful and timely information to managers on available forage so that stocking rates can be adjusted appropriately

### **Invasive Species**

- Policy and decision makers, general public, and industry representatives exhibit increased understanding of invasive species and the related economic and environmental costs of inaction
- Develop and implement appropriate state and federal regulations to prevent new introductions
- Leverage new resources to address the problem
- Minimize impacts to desirable fish populations through suppression of existing invasive species
- Identify direct and indirect effects of established exotics on food web and implications to valuable fish populations (GLFC white paper)

### **Habitat Assessment, Inventory, and Classification**

- Preserve essential habitat
- Increase habitat availability
- Adopt policies for the protection of valuable groundwater influences on nearshore habitat
- Identify fish species that experience increases in natural reproduction/ recruitment related to measurable restoration techniques
- Protect/restore/stabilize important fish habitats
- Increase natural reproduction
- Facilitate coordinated habitat work (e.g., EPA, GLFC)

### **Coordination of Funding Activities**

- Maintain and establish new relationships with other Great Lakes funders that demonstrate the value of cooperative funding efforts (i.e., leverage resources, avoid duplication)

### **Dissemination of Project Results**

- Increase the opportunities and methods for sharing project results

### **Ultimate Results:**

- Create a more resilient and stable fish community of valued species
- Increase the sustainable value of the fishery to the stakeholders
- Preserve self-sustaining fish populations
- Reduce the cost of fishery management in relation to benefits provided
- Enhance the ability of managers/agencies to respond to changes in the fishery and ecosystem
- Build research capacity and management expertise needed to understand and manage Great Lakes ecosystem for sustainable production of valuable species



# Great Lakes Stewardship

## HISTORY

The goal of the GLFT's Great Lakes education initiative is to increase awareness and understanding of the Great Lakes ecosystem so that citizens can be advocates for strategies that support long-term sustainability of the Great Lakes fisheries and become active stewards of the Great Lakes.

The GLFT has dispersed \$4,453,935 for 13 stewardship-related projects since 1998. The majority of these funds (\$3,344,696) was granted for the development of a statewide Great Lakes ecological information system at Michigan's state fish hatcheries. Two projects were funded to assist the GLFT in setting strategic priorities related to Great Lakes education: a Great Lakes fisheries education assessment and summary of needs, and a Great Lakes ecosystem and fisheries education networking conference. Several smaller grants were made to support specific public Great Lakes stewardship delivery systems directed at school children and Great Lakes shoreline owners.

## STRATEGIC PROPERTIES

The GLFT will support two tiers of environmental education: communicating with and educating the general public and creating the next generation of stewards. The GLFT recognizes that competing with the mass media for the attention of adults on Great Lakes issues is a challenge, given the relatively limited resources available. It also recognizes that the focus of current K–12 public school curricula on statewide education objectives and related assessments and testing limit opportunities to insert new curricula focused on Great Lakes stewardship through traditional approaches are limited. Nonetheless, the GLFT Board of Trustees and SAT members still feel a deep sense of responsibility toward the concept of creating informed advocates for the Great Lakes (i.e. stewards).

Unlike its other two funding categories, the Great Lakes Stewardship grant category does not have identified outcomes. GLFT grants in this category will be targeted to support other organizations whose primary objectives and staff expertise focus on providing Great Lakes public information and educational programs and materials. The GLFT will also use its grant program to encourage innovative and sustainable Great Lakes education delivery systems, facilitate public education outreach as part of its Access and Ecosystem Health and Sustainable Fish Populations grants, and provide a source of special grant funding to take advantage of unique opportunities to target specific stakeholders about critical Great Lakes issues. Specifically, the GLFT has set the following funding priorities for building Great Lakes stewards through public education and information:

- Support development of innovative approaches such as placed-based pilot education programs designed to invigorate K–12 standards-based science curricula with locally relevant Great Lakes issues through teacher training and the use of local stakeholder expertise and community involvement to build a sense of environmental stewardship and advocacy among area youth.

- Provide supplemental environmental education grants as a “general community contributor” in support of projects funded by organizations that share Great Lakes education goals and objectives with the GLFT.
- Encourage and support opportunities for education outreach as an element of other GLFT-funded projects (e.g., fishing access, research, and habitat restoration).
- Continue to seek and provide support for unique opportunities to provide specific information and education materials to targeted audiences on important Great Lakes management issues, particularly when the timeliness of communicating information to stakeholders is critical.

## **Appendix:** *GLFT Board, Advisory Team, and Staff*

### **Board of Trustees**

George Bennett, Vice Chairman of Tribal Council, Grand Traverse Band of Ottawa and Chippewa Indians

Andy Buchsbaum, Director, Great Lakes Field Office, National Wildlife Federation

Doug Craven, Natural Resources Director, Little Traverse Bay Band of Odawa Indians

Jim Ekdahl, Upper Peninsula Field Deputy (Acting Chair for Rebecca Humphries, Director), Michigan Department of Natural Resources

Bob Hardenburgh, Natural Resources Director, Little River Band of Ottawa Indians

Jim Riley, Assistant Attorney General (for Michael Cox, Attorney General), Michigan Department of Attorney General

Sam Washington, Executive Director, Michigan United Conservation Clubs

Charlie Wooley, Assistant Regional Administrator, U.S. Fish and Wildlife Service, Department of the Interior

### **The Scientific Advisory Team**

Doug Denison, National Wildlife Federation

Jason Dinsmore, Michigan United Conservation Clubs

Tom Gorenflo, Chippewa Ottawa Resource Authority

Sharon Hanshue (Co-Chair), Michigan Department of Natural Resources

Mark Holey, U.S. Fish and Wildlife Service, Department of the Interior

Brad Latvaitis and Jon Allan, Detroit Edison Company

Steve Lenart, Little Traverse Bay Band of Odawa Indians

Archie Martell, Little River Band of Ottawa Indians

Erik Olsen, Grand Traverse Band of Ottawa and Chippewa Indians

Bob Reider and Bill Kovalak (Co-Chairs), Consumers Energy

Bill Taylor, Michigan State University

### **Staff (Public Sector Consultants)**

Jack Bails, Manager

Mark Coscarelli, Assistant Manager

Julie Metty Bennett, Assistant Manager

Holly Madill, Assistant Manager



600 W. St. Joseph  
Suite 10  
Lansing, MI, 48933-2267  
517.371.7468 ph  
517.484.6549 fx  
[www.glft.org](http://www.glft.org)

