



STRATEGIC PLAN

2000 UPDATE

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STRATEGIC PLANNING

1996–99 PLAN

The Great Lakes Fishery Trust (GLFT or Trust) was formed in May 1996. In June 1996, the newly appointed Board of Trustees participated in an introductory board-training session, familiarizing them with the roles, responsibilities, administration, and management decisions with which they are entrusted.

Trust members recognized the need for an organizational plan and secured the services of the Institute for Conservation Leadership to guide them through a four-phase planning process. Members of the board and the Scientific Advisory Team (SAT) participated in the planning retreats held during several phases of the strategic planning process.

Following completion of the final planning phase, the Trust prepared its first formal strategic plan for 1996–99, with the assistance of its contracted manager, Public Sector Consultants, Inc. In its *Strategic Plan 1996–99*, the GLFT set forth its mission, vision, mandate, and goals and objectives. The document also outlines the Trust’s decision-making and evaluation processes and the funding criteria it would use during the first three years.

During this time, the board also adopted the current investment-policy statement. The statement provides that the Trust shall disburse grant funds on a fixed dollar amount yearly. In accordance with this statement and the various assumptions underlying it, Trust funds will be exhausted by 2020.

2000 UPDATE

The emphasis during the first three years was on the mechanics of establishing the Trust, including contracting for staff services to develop procedures and begin operation. In its formative years, the Trust’s strategic objectives focused on financial accounting; receipt and sale of land assets; grant solicitation, selection, and management; and investment planning.

In 1999 the Trust initiated several steps, including a survey of trustees, SAT members, and grantees that would enable the Trust to evaluate progress made in meeting its original objectives. Board, SAT, and staff members were invited to identify issues and future desired outcomes in preparation for a facilitated retreat held in August 1999 to update the strategic plan.

The GLFT has not changed the mission, vision, or mandate statements that originally were developed and based on the Ludington Pumped Storage Settlement Agreement and the Declaration of Trust. It has, however, adopted new long-term goals and short-term objectives, and they are presented in this 2000 strategic plan update. This update was prepared by the staff of the GLFT and is based on discussions at the retreat and subsequent guidance from the board and the SAT. It was formally adopted by the Trust in January 2000.

ON-GOING EVALUATION AND FUTURE UPDATES

The detailed objectives, action plans, and accomplishment benchmarks in this strategic plan periodically will be reviewed by the Trust as part of an ongoing process to evaluate progress in meeting its long-term goals. The GLFT will revisit the strategic plan, assessing progress,

establishing new objectives, and making appropriate adjustments to the long-term goals before January 2005.

MISSION STATEMENT

The mission of the Great Lakes Fishery Trust is to provide funding to enhance, protect, and rehabilitate Great Lakes fishery resources. The Trust 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 citizens 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 Trust 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 Trust will dedicate its assets to fostering realization of this vision, particularly for Lake Michigan.

The guiding principle of the Trust is to consider the total environment, recognizing the connections in 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 Trust recognizes that public understanding of, and involvement in, Great Lakes fishery management is essential to successfully attaining its objectives.

Projects to be funded by the Trust include public education, scientific research, preservation and rehabilitation of native species and habitat, fishing access, and fishery habitat restoration. The Trust will work cooperatively with the many Great Lakes fishery interests and authorities already active in the Great Lakes community. The Board of Trustees governing the Great Lakes Fishery Trust also reflects these diverse interests and experiences.

The Trust, a nonprofit corporation, will conduct its affairs in an open and objective manner, consistent with the Declaration of Trust and the Settlement Agreements, which were effective on May 1, 1996. These Agreements resolved longstanding concern for the impacts of the Ludington Pumped Storage Plant on the Lake Michigan fishery and its users.

MANDATE

The Great Lakes Fishery Trust was created in May 1996 to provide funding to compensate the citizens 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.

In 1986 the Michigan United Conservation Clubs (MUCC) and the National Wildlife Federation (NWF) initiated a legal proceeding before the Federal Energy Regulatory Commission (FERC). Shortly thereafter, the State of Michigan joined the FERC procedure and initiated a lawsuit against Consumers Power Company (Consumers Energy) and the Detroit Edison Company, the owners of the Ludington Pumped Storage Plant. The litigation sought, among other things, mitigation and abatement of the fish mortality as well as monetary compensation for both past and anticipated future damages to fish and associated recreational values. The litigation was resolved through a 1995 Settlement Agreement (Agreement) approved by the courts and a companion agreement approved by the Federal Energy Regulatory Commission (FERC), the licensing authority for the Ludington plant. The Agreement calls for the creation of the Trust with an initial payment of \$5 million. The Trust also will receive annual payments from the plant owners from July 1994 until the FERC license term expires, in 2019.

Annual payments compensate for continuing losses to the Lake Michigan fishery. The payment will be adjusted annually to reflect changes in fish mortality as a result of actual plant operations. The payment will be inflation-adjusted beginning in June 1998. In addition, the Agreement provides for transfer of approximately 10,800 acres of land to the Trust. The parties to the Agreement intended that the Trust sell these lands to provide additional revenue to the Trust. The trustees will take appropriate measures to protect the natural and cultural resource values of these lands. In addition, the Trust may accept gifts, grants, and bequests.

The Trust is administered by a six-member Board of Trustees representing the Michigan Department of Natural Resources (MDNR), Michigan Department of Attorney General, Grand Traverse Band of Ottawa and Chippewa Indians, Michigan United Conservation Clubs, National Wildlife Federation, and U.S. Department of Interior. In addition, the Tribal Councils of the Little River Band of Ottawa Indians and Little Traverse Bay Band of Odawa Indians have designated provisional trustees; they may participate in Trust deliberations but not vote.

The Settlement Agreement and the Declaration of Trust define the specific powers and duties of the trustees. Any trustee may propose a project, activity, or acquisition for funding from the Trust, provided that the project meets the criteria governing permissible uses of Trust moneys; such uses include

- research projects directed at increasing the benefits associated with Great Lakes fishery resources;
- rehabilitation of lake trout, lake sturgeon, and other populations;
- protection and enhancement of fisheries habitat, including Great Lakes wetlands as fisheries habitat;
- public education concerning the Great Lakes fisheries;
- acquisition of real property for the above purposes or to provide access to the Great Lakes fisheries; and

- any other purposes consistent with the above and duly approved by the trustees.

Trust funds will be spent to advance these objectives, with emphasis on projects that will benefit the Lake Michigan fishery. Trust funds may not be used as a substitute for traditional sources of funding for Great Lakes fishery resources but may supplement traditional sources and be used to accomplish the purposes for which the Trust was formed.

The trustees are authorized to form a nonprofit corporation to promote the uses and purposes provided for in the Declaration of Trust, invest Trust moneys, and purchase, sell, or lease land. Trustees will authorize funding, by vote of a simple majority, for proposals specific to Lake Michigan; five of the six votes are required to (1) authorize a proposal that benefits the fishery of the Great Lakes Basin but is not specific to Lake Michigan or to (2) authorize the acquisition or sale of real property.

The Agreements also established a 12-member Scientific Advisory Team (SAT) for the purpose of evaluating the data and information upon which the Settlement Agreements are based. These tasks include annually calculating compensation for unavoidable fish loss to the Lake Michigan fishery, recommending and providing review of projects to the trustees, and reviewing the lands transferred to the Trust to identify and protect their fisheries values prior to sale.

The SAT is composed of representatives of the organizations serving on the Trust (except for the Michigan Department of the Attorney General) and also includes representatives from Consumers Energy and the Detroit Edison Company, as well as the Chippewa-Ottawa Treaty Fishery Management Authority and a representative chosen by mutual agreement of the MUCC, NWF, and MDNR. With respect to any project approved and funded by the Great Lakes Fishery Trust, and subject to the supervision and direction of the trustees, the SAT has the responsibility for (1) recommending and defining research projects, (2) retaining contractors, (3) selecting technology, (4) implementing projects, (5) defining protocols and procedures for oversight of projects and (6) any other responsibilities defined by the trustees.

In the course of its business, the Great Lakes Fishery Trust does not discriminate in regard to a person's race, color, religion, national origin, ancestry, age, sex, height, weight, or marital status.

GOALS

The GLFT will continue to manage its investments and income with the goal of exhausting its resources by 2020. The Trust will demonstrate its ability to select and manage grants such that other sources of funding will be available to continue support of GLFT activities beyond 2020. The Trust is committed to using its resources to mitigate, for the benefit of stakeholders, for past and future fish losses at the Ludington Pumped Storage Facility. Consistent with its mission, vision, and mandate, the GLFT has established five goals for the next two decades.

GOALS FOR 2000–20

FISHING ACCESS Significantly increase access to the Great Lakes fisheries for shore-based angling and tribal fishing

EDUCATION Increase citizen awareness and understanding of the ecology of the Great Lakes so that citizens can be advocates for strategies that support long-term sustainability of the Great Lakes fisheries

RESEARCH Develop knowledge and management capability through targeted research that will increase predictability and sustainability of the Great Lakes fisheries

HABITAT Implement habitat restoration and protection strategies that will result in significant and measurable benefits to sustain or enhance Great Lakes fish populations

In addition, the GLFT recognizes its unique status as an independent, private funding source that can respond to opportunities beyond the resources or mandate of government and private organizations. It intends to use its flexibility to encourage cooperative efforts that can significantly contribute to the Great Lakes fisheries. To this end, the Trust has established the following additional goal:

SPECIAL PROJECTS Maintain flexibility in funding, to assure that the GLFT can support cooperative and/or unique opportunities that will significantly contribute to the overall goal of a sustainable Great Lakes fishery

TARGETED FISH POPULATIONS

Habitat and research projects will focus on maintaining or rehabilitating a specific Great Lakes fish population. The primary fish populations of concern are lake trout and sturgeon. However, projects benefiting other important Great Lakes populations—e.g., salmonids (pacific salmon, trout, lake whitefish, menominees, ciscoes, and chubs), cool-water species (yellow perch, walleye, northern pike, muskellunge, and smallmouth bass), and forage species—will be considered for funding.

GEOGRAPHIC AREA OF INTEREST

Lake Michigan and its tributaries are the primary geographic target for projects. Secondary consideration will be given to projects that primarily benefit fisheries or fishing access outside the Lake Michigan watershed. Specific geographic areas of interest are identified in each goal as a part of the short-term objectives and action plan.

PARTNERSHIPS, COLLABORATION, COOPERATION

To maximize the benefits of its grant-making activities, the GLFT seeks partnerships with other organizations and encourages collaboration among grantees. The GLFT will manage its resources to complement the goals and objectives of organizations that have Great Lakes responsibilities, by providing resources that are not otherwise available. While the GLFT has specific areas of interest and focus, it supports projects and activities consistent with the management goals and legal mandates of government entities that have Great Lakes responsibilities. The GLFT wishes to serve as a mechanism through which the private

conservation organizations, Indian tribes, and federal and state agencies represented on the GLFT board can provide a national model demonstrating how cooperative actions among organizations having diverse stakeholders can result in sustained improvement of a shared natural resource.

OBJECTIVES

Where practical, the GLFT has set measurable objectives for each of its long-term goals. Action plans and benchmarks are established where specific activities already have been initiated or planned. The staff of the GLFT, in consultation with the SAT, will be responsible for preparing additional objectives, annual action plans, and benchmarks that support the long-term goals.

FISHING ACCESS

2020 Goal

Significantly increase access to the Great Lakes fisheries for shore-based angling and tribal fishing

OBJECTIVES

First Priority

1. Improve or create new shore-based Great Lakes angling opportunities at 20 locations on the Lake Michigan shoreline, from New Buffalo to Mackinaw City, and on major tributaries within the state of Michigan.
2. Improve or create tribal fishing access in all 1836 treaty waters.

Second Priority

3. Improve or create new shore-based Great Lakes angling opportunities at 20 additional Michigan locations that are directly located on the Great Lakes or major connecting waterways (Lake St. Clair and St. Marys, St. Clair, and Detroit rivers); ten shall be in counties with a population exceeding 200,000.
4. Provide information to anglers on the availability of shore-based Great Lakes fishing opportunities in Michigan.

ACTIONS CURRENTLY UNDERWAY OR PLANNED FOR 2000

- Continue to solicit grant applications from local communities and public agencies for creating angler-access facilities.
- Institute policy to accept pre-applications at any time for funding consideration of fishing access projects. The GLFT will consider fishing-access grants twice each year, following screening and review by the staff and SAT.
- Issue a contract to inventory existing and potential shore-based angler sites on Lake Michigan between New Buffalo and Mackinaw City. Use inventory results to publish the

first model shore-based fishing guide and to identify locations that have potential to expand shore-based fishing opportunities.

- Establish a formal, long-term partnership with the Army Corps of Engineers (ACOE) and the Michigan Department of Natural Resources to improve shore-based fishing opportunities at existing piers and breakwaters.
- Use results from the current tribal-access assessment grant as the basis for funding for new tribal-access facilities.
- Use results from the National Wildlife Federation Detroit River fishing-access assessment grant as the basis for funding new shore-based fishing opportunities in urban areas.

BENCHMARKS FOR MEASURING PROGRESS

January 2001

- At least three additional access projects funded, consistent with the short-term objectives
- Inventory completed of shore-based angler opportunities from New Buffalo to Mackinaw City; fishing guide ready for publication; potential sites identified for enhanced shore-based angling in inventory area
- At least two projects funded to enhance tribal fishing access
- At least one enhanced angler-access project funded on the Detroit River
- Agreement formalized with the ACOE and MDNR for enhancing angler access to and use of existing facilities

January 2005

- Construction completed on at least eight new angler-access facilities and grant funding provided for an additional five sites in the targeted geographic areas
- 150,000 copies of *Michigan Shore-Based Great Lakes Fishing Guide* distributed
- Contact made with every shoreline community from New Buffalo to Mackinaw City that is a potential site for expanded or enhanced shore-based fishing
- Five projects completed with the ACOE and/or MDNR to enhance fishing opportunities at existing facilities
- Construction completed on three tribal fishing-access facilities in northern Lake Michigan and Lake Huron and expansion funded of two additional such facilities

EDUCATION

2020 Goal

Increase citizen awareness and understanding of the ecology of the Great Lakes so that citizens can be advocates for strategies that support long-term sustainability of the Great Lakes fisheries

OBJECTIVES

NOTE: These objectives are subject to refinement after assessment.

1. Annually involve 70,000 Michigan fifth and ninth grade students in Great Lakes fishery education outreach programs; this shall be accomplished in schools and through nonprofit organizations.
2. Annually expose 500,000 adults and youth to educational interpretive displays on the ecology and management of Great Lakes fisheries; this shall occur at ten permanent locations throughout the state.
3. Install interpretive displays on Great Lakes ecology and fishery management; this shall occur at 50 existing education facilities, half of which are located in counties with population exceeding 200,000.
4. Provide timely information on GLFT activities to the general public, potential grantees, elected officials, and key organizations.

ACTIONS UNDERWAY OR PLANNED FOR 2000

- Negotiate a directed grant that will assess education needs (i.e., identify current education initiatives and audiences, gaps, desired learning outcomes for target groups, and partnership opportunities); recommend appropriate modification of GLFT education-funding objectives.
- Develop a comprehensive GLFT public-information strategy that will target audiences and methods and assure that timely information is easily accessible through such media as publications, a Web site, a slide show, display boards, and a video.

BENCHMARKS FOR MEASURING PROGRESS

January 2001

- Contract negotiations completed and work on education-assessment grant initiated
- Public information strategy and initial implementation adopted
- RFP prepared for independent evaluation of success of Great Lakes interpretive displays

January 2005

- First public education grants completed: Project Fish, Fish for All, and Interpretive Initiative at State Hatcheries
- Education assessment completed and grants issued for implementation of key elements
- Public information programs established in all key areas
- Independent evaluation of Interpretive Initiative at State Hatcheries completed

RESEARCH

2020 Goal

Develop knowledge and management capability through targeted research that will increase predictability and sustainability of the Great Lakes fisheries

OBJECTIVES

1. Maintain a focus on funding research that will assist in addressing fisheries recruitment and the fish-health issues that are key factors affecting abundance and/or sustainability of important Great Lakes fish populations.
2. Support development and use of new and innovative fisheries-assessment tools and techniques that will yield more accurate and cost-effective information critical to managing important Great Lakes fish populations.
3. Support adoption of holistic, ecological approaches to fisheries management by encouraging interagency collaboration on a research agenda that integrates knowledge across trophic levels.
4. Support grants directed toward rehabilitating specific fish populations and involving collaborative, integrated efforts of several research organizations in a targeted area.

ACTIONS CURRENTLY UNDERWAY OR PLANNED FOR 2000

- Award a grant for the purchase of portable acoustical equipment for use by Great Lakes research and management agencies to enable them to estimate the abundance of forage fish populations.¹
- Continue to support and monitor Bacterial Kidney Disease (BKD) and Early Mortality Syndrome (EMS) projects.
- Continue to support and monitor progress of existing fish-recruitment research grants.

¹ Please see "Special Projects."

- Sponsor a symposium to develop a directed research grant for rehabilitating lake sturgeon in a targeted area.
- Solicit additional research grants that focus on the thematic areas of fish health and recruitment.
- Identify additional areas to which directed research dollars should be targeted.
- Conduct a site visit to evaluate progress in developing a prototype lake sturgeon fish-passage device.

BENCHMARKS FOR MEASURING PROGRESS

January 2001

- New, portable acoustical-sampling equipment acquired and made available to management and research agencies to enable them to estimate the abundance of Lake Michigan forage fish
- Symposium completed on lake sturgeon research needs and directed-research RFPs developed
- Additional directed-research areas identified by the SAT
- Preliminary prototype designed and evaluated for lake sturgeon fish-passage device
- Up to five new research grants awarded in the thematic areas of recruitment and fish health

January 2005

- Final reports and scientific papers on ten GLFT-funded research projects published and widely distributed to fisheries research and management institutions in the Great Lakes region
- Lake sturgeon fish ladder successfully installed in the Menominee River; evaluation begun
- Results published on the directed Sturgeon Restoration Grant being used by management agencies to implement restoration strategies
- Results published on BKD research methodologies being widely used, as part of annual egg-taking operations, to screen Great Lakes salmon and trout for disease

HABITAT
2020 Goal

Implement habitat restoration and protection strategies that will result in significant and measurable benefits to sustain or enhance Great Lakes fish populations

OBJECTIVES

1. Select a large Michigan river system tributary to Lake Michigan for intensive habitat restoration and protection. Implement a ten-year plan that models an integrated ecosystem approach to fishery-habitat management, using a full range of available funding strategies including research, citizen education, support for developing regulations, and best-management practices for land use, land acquisition, restoration fish populations, etc.
2. Following completion of the ten-year plan to model an integrated ecosystem (see above), selectively apply results to additional, selected river systems.
3. Work with other organizations to establish a uniform system for locating and quantifying near-shore and open-water habitat for Great Lakes fisheries that may be used to monitor future changes and vulnerability.
4. Evaluate the effectiveness of habitat-restoration efforts currently funded on the South Branch of the Pere Marquette River.

ACTIONS CURRENTLY UNDERWAY OR PLANNED FOR 2000

- Select a major river system for implementing the model approach to habitat restoration and protection and begin to assemble support from local entities and others willing to participate in the effort.
- Solicit advice from the Great Lakes Fishery Commission on the status of fisheries habitat-inventory work in Lake Michigan and the key elements needing additional financial support.
- Continue to fund and monitor the habitat-rehabilitation project on the South Branch of the Pere Marquette River.

BENCHMARKS FOR MEASURING PROGRESS

January 2001

- First directed-grant requests prepared for initial work on selected model river system
- Key areas identified, with the assistance of the GLFC staff, that need funding to complete Lake Michigan habitat-inventory work; directed-grant RFP prepared for completion of essential components

- Preliminary results published and distributed on the first two years of the habitat-restoration project of the South Branch of the Pere Marquette River

January 2005

- Six major projects funded as a part of the model river system, including one to a major local stakeholder group that is organizing local efforts
- Lake Michigan habitat-inventory work completed with Trust support
- Final report of the South Branch project published and distributed; independent evaluation of results completed

SPECIAL PROJECTS

2020 Goal

Maintain flexibility in funding, to assure that the GLFT can support cooperative and/or unique opportunities that will significantly contribute to the overall goal of a sustainable Great Lakes fishery

OBJECTIVES

1. Establish an annual funding strategy that preserves the flexibility of the GLFT to evaluate and fund cooperative and/or unique opportunities that significantly contribute to the overall mission of the Trust.

ACTIONS CURRENTLY UNDERWAY OR PLANNED FOR 2000

- Continue to support and monitor the results of the pilot project designed to provide an inexpensive and practical method of eliminating accidental introduction of exotic freshwater organisms through the residue remaining in ballast-water tanks of ocean-going vessels entering the Great Lakes.
- Propose an annual funding process that will reserve funds for use on special projects.
- Award a grant for the purchase of portable acoustical equipment for use by Great Lakes research and management agencies in estimating the abundance of forage fish populations.

BENCHMARKS FOR MEASURING PROGRESS

January 2005

- U.S. Coast Guard regulation adopted to require use of a biocide to destroy exotic freshwater organisms remaining in the residue in empty ballast tanks of ocean-going vessels entering the Great Lakes