



Oregon

Tina Kotek, Governor

Department of State Lands

775 Summer Street NE, Suite 100

Salem, OR 97301-1279

(503) 986-5200

FAX (503) 378-4844

www.oregon.gov/dsl

State Land Board

Tina Kotek

Governor

Tobias Read

Secretary of State

Elizabeth Steiner

State Treasurer

State Land Board

**October 14, 2025
9:30 am – 12:00 pm
Meeting Agenda**

Public Wi-Fi logon: LandsDSL

*This is a hybrid meeting that can be attended in-person at
775 Summer St. NE, Suite 100, Salem, OR 97301-1279 or online
through the Department of State Lands' livestream video:
www.youtube.com/@oregonstatelands*

State Land Board Awards Presentation

From 9:30 – 10:00 a.m., the State Land Board will present the annual Land Board Awards to:

- **Stream Award:** Sheep Creek Stewardship Project
- **Wetland Award:** West Sundial Wetlands
- **Partnership Award:** John Day Basin Partnership
- **Catalyst Award:** Kyle Waggoner, Umatilla County Soil and Water Conservation District

CONSENT ITEMS

1. Request for approval of the minutes of the June 10, 2025, State Land Board Meeting and July 9, 2025, Special State Land Board Meeting

ACTION ITEMS

2. Elliott State Research Forest Board Appointments
Public testimony will be taken on this item.

Continued on the next page

INFORMATIONAL ITEMS

3. Common School Fund Annual Report
No public testimony will be taken on this item.
4. Oregon Ocean Science Trust Annual Report
No public testimony will be taken on this item.
5. South Slough National Estuarine Research Reserve Annual Report
No public testimony will be taken on this item.
6. Southern Resident Orca Management Plan
No public testimony will be taken on this item.
7. Other
No public testimony will be taken on this item.

WATCH THE MEETING ONLINE

Meeting video and audio will be livestreamed, and the recording available after the meeting, on the DSL YouTube Channel: www.youtube.com/@oregonstatelands

ATTEND IN-PERSON

This meeting will be held in a facility that is accessible for persons with disabilities. If you need assistance to participate in this meeting due to a disability, please notify Arin Smith at arin.n.smith@dsl.oregon.gov at least two working days prior to the meeting.

Visitors are **NOT permitted to bring backpacks, bags, or large purses** into the State Lands building prior to, during, or following Land Board meetings. Purses, medical bags, and diaper bags are permitted, but may be subject to inspection by the Oregon State Police.

PROVIDE PUBLIC TESTIMONY

The State Land Board places great value on information received from the public. The public may provide written or spoken (online or in-person) testimony regarding consent and action agenda items, time permitting and at the discretion of the Chair.

- **Providing Written Testimony:** Testimony received by 10 a.m. on the Monday before the meeting will be provided to the Land Board in advance and posted on the meeting website. Submit your input in writing to: landboard.testimony@dsl.oregon.gov. Testimony received after this deadline may not be provided to the Land Board prior to a vote. Please indicate the agenda item your testimony relates to.
- **Providing Spoken Testimony by Video/Phone or In Person:** Advanced sign-up is required for the public to provide spoken testimony (in-person or by Zoom). The sign-up deadline is 10 a.m. the day before the meeting.
Please note: When the number of people interested in speaking exceeds the time allotted for an agenda item, speakers are randomly selected for testimony slots to ensure all have an equal opportunity to testify. Speakers have the same chance of being randomly selected whether they plan to testify in person or by Zoom. The testimony order will be posted to the State Land Board Meetings webpage the day before the meeting, and everyone who signed up to testify will be notified of the testimony order via email. Be aware there may not be time for everyone who signs up to speak.

Additional Testimony Information

- Testimony on action items is taken during the item's presentation, before the Land Board votes. Please review the meeting agenda and be present and prepared to provide testimony at the appropriate time.
- The Board typically accepts testimony on consent and action items only.
- The standard time limit is three minutes for each individual; the actual time available for testimony during Land Board meetings is at the discretion of the Chair.
- The Board may not be able to accept testimony on items for which a formal comment period has closed, such as a rulemaking comment period. The meeting agenda indicates whether testimony will be accepted on an item.



Oregon

Tina Kotek, Governor

Department of State Lands

775 Summer Street NE, Suite 100

Salem, OR 97301-1279

(503) 986-5200

FAX (503) 378-4844

www.oregon.gov/dsl

State Land Board

Tina Kotek

Governor

Tobias Read

Secretary of State

Elizabeth Steiner

State Treasurer

M E M O R A N D U M

Date: October 14, 2025

To: Governor Tina Kotek
Secretary of State Tobias Read
State Treasurer Elizabeth Steiner

From: Kaitlin Lovell
Director

Subject: The 21st Annual State Land Board Awards (Item 0)

Every year, the State Land Board honors exceptional projects and partners for their contributions to protecting and enhancing Oregon's treasured natural resources.

Established in 2004, the State Land Board Awards are an annual celebration of Oregonians working together to help lands, waters, and wetlands thrive. To date, more than 50 awards have been presented, recognizing extraordinary efforts in every region of Oregon.

Land Board Award Winners

Today, in the 21st year of the State Land Board Awards, we are presenting a Stream Award, a Wetland Award, a Catalyst Award, and a Partnership Award.

STREAM AWARD

Sheep Creek Stewardship Project

This project restored over 8.6 miles of streams and reconnected 101 acres of wetland habitat on a tributary of the upper Grande Ronde River in Oregon's Blue Mountains. Coordinated with a broader forest restoration effort, the project created a ridgetop-to-ridgetop restoration corridor that improves wildlife habitat,

wildfire resilience, and water quality. Located in a high montane meadow that serves as source water for several downstream communities, the project stands out for its innovative use of restoration tools and early ecological success, highlighted by the return of beaver and improved habitat for species such as Columbia River bull trout.

WETLAND AWARD

West Sundial Wetlands

The West Sundial Wetlands mitigation project transformed over 82 acres in Troutdale from a landscape dominated by non-native pasture grasses and invasive forbs into a thriving wetland ecosystem. The project created a diverse mosaic of habitats, including forested wetlands, emergent wetlands, scrub-shrub wetlands, and upland buffers, while also providing flood storage for the surrounding community. It enhances habitat connectivity within the watershed and supports sensitive species such as the northern red-legged frog and numerous wetland-associated birds. The adjacent Ch'ak Ch'ak Trail offers wildlife viewing opportunities and features an interpretive panel developed in partnership with the Confederated Tribes of the Grand Ronde Community of Oregon to honor and share the area's cultural and historical significance.

CATALYST AWARD

Kyle Waggoner, Umatilla County Soil and Water Conservation

As Umatilla County Soil and Water Conservation District Manager, Kyle Waggoner plays a pivotal role in connecting rural landowners and irrigators with natural resource agencies such as the Confederated Tribes of the Umatilla Indian Reservation, the National Oceanic and Atmospheric Administration's National Marine Fisheries Service, the Oregon Department of Fish and Wildlife, the Oregon Department of State Lands, the U.S. Army Corps of Engineers, and the U.S. Bureau of Reclamation. His leadership has been instrumental in efforts like the Landowner's River Resiliency Guidebook and the City of Pendleton's successful \$3.7 million grant for large-scale stream restoration and the McKay Creek Watershed Action Plan. With deep local roots, strategic insight, and a collaborative, solutions-oriented approach, Kyle is a driving force for conservation and restoration in Umatilla County.

PARTNERSHIP AWARD

John Day Basin Partnership

A coalition of 30 tribal, local, state, and federal partners, the John Day Basin Partnership is advancing large-scale restoration in Oregon's largest basin managed for wild salmonids and home to the state's longest free-flowing river.

Over the past six years, the Partnership has implemented a series of coordinated projects that have removed 58 fish passage barriers, restored over 50 miles of stream habitat, reconnected 230 acres of floodplain, improved 681 acres of riparian habitat, planted more than 250,000 native plants, and installed over 1,100 beaver dam analogs. These efforts have improved conditions for species such as Middle Columbia River summer steelhead, bull trout, Chinook salmon, and Pacific lamprey. Core partners include the Confederated Tribes of the Umatilla Indian Reservation, Confederated Tribes of Warm Springs, local soil and water conservation districts, watershed councils, Blue Mountain Land Trust, and Trout Unlimited.



Oregon

Tina Kotek, Governor

Department of State Lands

775 Summer Street NE, Suite 100

Salem, OR 97301-1279

(503) 986-5200

FAX (503) 378-4844

www.oregon.gov/dsl

State Land Board

The State Land Board (Land Board or Board) met in regular session on June 10, 2025, Shutter Creek Facility 95200 Shutters Landing Ln, North Bend, OR 97459. The meeting audio and video was livestreamed on the DSL YouTube channel.

Tina Kotek
Governor

Tobias Read
Secretary of State

Elizabeth Steiner
State Treasurer

Present were:

Tina Kotek
Tobias Read
Elizabeth Steiner

Governor
Secretary of State
Treasurer

Land Board Assistants

Geoff Huntington
Dmitri Palmateer
Jessica Howell

Governor's Office
Secretary of State's Office
State Treasurer's Office

Department Staff

Vicki Walker	Bill Ryan	Ellie Forness	Katrina Scotto di Carlo
Arin Smith	Chris Castelli	Ali Ryan Hansen	Linda Safina-Massey
Ted Bright	Cait McCusker	Hannah Beverage	Alyssa Rash

Department of Justice

Matt DeVore

Governor Kotek called the meeting to order at 10:00 a.m. The topics discussed and the results of those discussions are listed below. To view the Land Board (Board) meeting in its entirety, please visit our YouTube page: [June 10, 2025, Land Board Meeting](#)

Consent Items

1. Minutes

Secretary Read made a motion to approve the minutes for the April 8, 2025, Land Board meeting.

Treasurer Steiner seconded the motion.
The item was approved at 10:03 a.m. without objection.

ACTION ITEMS

2. Request to initiate rulemaking for Division 145, remediation and habitat restoration

Director Walker presented the issue of Whether the State Land Board should initiate permanent rulemaking for administrative rules in OAR 141-145-0060, which outlines the compensation method for authorization of remediation and habitat restoration activities on State-owned submerged and submersible lands. Limited rulemaking is needed to support active rulemaking already underway for OAR 141-082.

The Department recommended the Land Board authorize the Department to initiate permanent rulemaking for OAR 141-145-0060 which outlines the compensation method for authorization of remediation and habitat restoration activities of State-owned submerged and submersible lands.

Secretary Read made a motion to approve the action item.
Treasurer Steiner seconded the motion.
The item was approved at 10:07 a.m. without objection.

3. Request to initiate rulemaking for Division 83, undersea cables

Director Walker presented the issue of whether the State Land Board should initiate permanent rulemaking for administrative rules in OAR 141-083 which govern easements for undersea cables on state-owned submerged and submersible land in Oregon's territorial sea. Rulemaking is needed to conform with the updated Territorial Sea Plan: Part Four and Part Five, as well as improve the easement application process. Rulemaking may also be needed for establishing fees in rule, dependent on the outcome of Senate Bill 793 A

The Department recommended that the Land Board authorize the Department to initiate permanent rulemaking under OAR 141-083, which governs easements for undersea cables on state-owned submerged and submersible land in Oregon's territorial sea.

Governor Kotek asked what the timeline looks like.
Director Walker responded that rulemaking should be complete by mid-2026.

Secretary Read asked what the plan is to involve the Public to avoid difficulties we have had in the past.

Deputy Director Bill Ryan joined Director Walker at the table and responded that in addition to the rules advisory committee that will start in the fall, there will be additional outreach and public engagement to ensure we are balancing interests whether they be environmental, economic development, or private property interest and making sure everyone is heard so the department can make an informed decision.

Secretary Read made a motion to approve the action item.
Treasurer Steiner seconded the motion.
The item was approved at 10:17 a.m. without objection.

4. Subsurface mineral and geothermal rights in Morrow County

Director Walker introduced Deputy Director Chris Castelli and Land Transaction Analyst John Gessner to assist in presenting the issue of whether the State Land Board should authorize the sale and release of approximately 274 acres of subsurface mineral and geothermal rights Morrow County, currently held by the Department of Administrative Services (DAS), to Rowan Percheron, LLC. This included staff findings.

Public testimony was taken from Mike Karas with Davis Wright Tremaine.

Treasurer Steiner asked why the valuation is so low and stated that the cost should also cover the cost of staff time.

Secretary Read agreed.

Treasurer Steiner stated that she is bothered that it is costing us more than we are getting back.

Deputy Director Chris Castelli stated that there is an application fee in addition to the sale price.

Treasurer Steiner stated that she would like to have further conversations about fee structures and possible rulemaking at a future meeting.

The Department recommended that the Land Board approve the sale and release of 274 acres of subsurface mineral and geothermal rights, currently held by DAS, located in Morrow County at Section 28, Township 3 North, Range 24 East, Tax Lot 123, to Rowan Percheron, LLC for \$2,740.

Secretary Read asked about the applicant's plans for the property.

Mr. Karas stated that the company builds data centers.

Secretary Read made a motion to approve the action item.

Treasurer Steiner seconded the motion.

The item was approved at 10:38 a.m. without objection.

5. LaPine in-lieu lands acquisition

Deputy Director Chris Castelli and Real Property Policy Specialist, Brian Cochran, assisted in presenting the issue of whether the Land Board should authorize the Department to accept a patent for an 80-acre property from the Bureau of Land Management for in-lieu lands still owed to the State of Oregon. The property consists of undeveloped forested land zoned high-density residential and inside the city limits of La Pine, in Deschutes County. If accepted, this would be a new school land addition.

The Department recommended that the Land Board authorize the Department to accept in-lieu land, known as a patent, from BLM for an 80-acre property located in La Pine, at a cost of \$0.

Secretary Read asked if there was an assessment of cultural significance and how that could affect protentional development.

Mr. Cochran stated that BLM did a full review and there were no issues.

Treasurer Steiner stated that Deschutes County is very excited about this property for possible residential use and looking forward to working with DSL.

Secretary Read made a motion to approve the action item.

Treasurer Steiner seconded the motion.

The item was approved at 10:51 a.m. without objection.

6. ODOT I-5 overpass easement

Director Walker presented the issue of whether the State Land Board should approve a request from the Oregon Department of Transportation (ODOT) for a permanent easement to maintain the freeway overpass crossing the Willamette River in Township 01 North, Range 01 East, Multnomah County.

The Department recommended the Land Board approve permanent easement 64044-EA to the Oregon Department of Transportation to maintain and operate freeway overpass on, over, under or across the Willamette River.

Governor Kotek asked how this came to be since the bridge was built so long ago.

Deputy Director Bill Ryan stated that this is a historically filled land situation.

Secretary Read and Treasurer Steiner both agreed that there has to be a more streamlined way to process things like this when it is agency to agency.

Secretary Read made a motion to approve the action item.

Treasurer Steiner seconded the motion.

The item was approved at 11:05 a.m. without objection.

INFORMATIONAL ITEMS

7. Geologic carbon sequestration update

Ruarri Day-Stirrat, Director of DOGAMI presented the informational item which focused on near-term engagement efforts.

Governor Kotek thanked Director Day-Stirrat for all of the work.

Treasurer Steiner asked if there is any sense of how much carbon dioxide (CO2) will be able to store in Oregon and what the value is.

Director Day-Stirrat stated that it has been assessed that 40 gigatons could be stored in Oregon and Washington. A full study still needs to be done, but a ton of CO2 mineralized in basalt is in the hundreds per ton value.

Secretary Read asked what we should be thinking about now, so we are ready to make decisions six months from now.

Director Walker stated that we will need to decide on the site.

Director Day-Stirrat added that in six months we will have a site chosen as well as a cost.

8. Legislative Update

11:17 a.m.

Ellie Forness, Government Relations Director, presented the item that included updates on DSL's priority bills.

HB 5539: The Department's budget bill.

HB 5539 was the first agency budget bill to move out of the Joint Committee on Ways and Means Subcommittee on Natural Resources. The bill passed out of the subcommittee with a unanimous vote and no discussion. The bill received strong bipartisan support throughout the legislative session.

Disclaimer: At the time of writing this memorandum the 2025 Legislative Session is still occurring, and we do not know the outcome of HB 5539.

Senate Bill 165 A: Clears title to historically filled lands by removing ownership uncertainty for private landowners while retaining future opportunities for public ownership of high-value lands.

SB 165 A received strong bipartisan support in both Senate and House policy committees and floors. The bill has been signed by Governor Kotek.

Senate Bill 793 A: Allows fair payment for easements in the territorial sea, ensures fees cover the cost of issuing those easements; gives the Department rulemaking authority.

SB 793 A is currently awaiting a work session in the Joint Committee on Ways and Means due to the fee authority it provides the Department. This bill has a minimal fiscal impact that can be absorbed using existing resources.

Disclaimer: At the time of writing this memorandum the 2025 Legislative Session is still occurring, and we do not know the outcome of SB 793 A.

Senate Bill 795 A: Promotes efficiency in Oregon's Abandoned & Derelict Vessels Program; implements community-supported fixes for effectively addressing the problem of hazardous vessels in publicly owned waterways.

SB 795 A is the first Department bill to move through the full legislative process for the 2025 legislative session. The bill received strong bipartisan support in the Senate chamber and passed the House unanimously.

Senate Bill 74 A: Improves the process for declaring rivers to be Oregon-owned.

SB 74 A received strong bipartisan support in the Senate and House chambers. The bill has now been signed by Governor Kotek.

Senate Bill 147 B: Housekeeping to more efficiently manage the Elliott State Research Forest.

SB 147 B moved through the Joint Committee on Ways and Means Subcommittee on Natural Resources with a unanimous vote and the Full Ways and Means Committee and the Senate Floor with strong bipartisan support.

Disclaimer: At the time of writing this memorandum the 2025 Legislative Session is still occurring, and we do not know the outcome of SB 147 B.

9. Department of State Lands Director Appointment

11:25 a.m.

Governor Kotek's Natural Resources Policy Advisor and Land Board Assistant, Geoff Huntington gave a brief update on the recruitment process.

10. Other

11:28 a.m.

To end her final Land Board meeting as she headed into retirement, Director Walker gave brief updates on the following topics:

- Steven's Road Parcel sale is almost complete
- DSL will be getting a \$1M grant for ADV cleanup

Director Walker thanked the Board and DSL staff for being a part of the seven years that she served as Director.

Governor Kotek, Treasurer Steiner and Secretary Read each took time to thank Director Walker for all of her work and accomplishments with DSL and to wish her a happy retirement.

The meeting was adjourned at 11:52 a.m.

Tina Kotek, Governor

Kaitlin Lovell, Director



Oregon

Tina Kotek, Governor

Department of State Lands

775 Summer Street NE, Suite 100

Salem, OR 97301-1279

(503) 986-5200

FAX (503) 378-4844

www.oregon.gov/dsl

State Land Board

The State Land Board (Land Board or Board) met virtually in special session on July 9, 2025. The meeting audio and video was livestreamed on the DSL YouTube channel.

Tina Kotek
Governor

Tobias Read
Secretary of State

Elizabeth Steiner
State Treasurer

Present were:

Tina Kotek
Tobias Read
Elizabeth Steiner

Governor
Secretary of State
Treasurer – via Zoom

Land Board Assistants

Geoff Huntington
Dmitri Palmateer
Jessica Howell

Governor's Office
Secretary of State's Office
State Treasurer's Office

Department Staff

Vicki Walker Bill Ryan
Arin Smith Ali Ryan Hansen
Ted Bright

Department of Justice

Matt DeVore

Governor Kotek called the meeting to order at 10:00 a.m. The topics discussed and the results of those discussions are listed below. To view the Land Board (Board) meeting in its entirety, please visit our YouTube page: [July 9, 2025, Land Board Meeting](#)

ACTION ITEMS

1. Appointment of the Department of State Lands Director and bond of Director

Governor Kotek opened the meeting for public testimony, however, the person who signed up to speak was not in attendance.

Interim Director Bill Ryan then introduced the Governor's Land Board Assistant and Natural Resources Policy Advisor, Geoff Huntington to present the item.

Mr. Huntington gave an overview of the recruitment and interview process.

Mr. Huntington then recommended the State Land Board appoint Kaitlin Lovell to serve for a term of four years as the Department of State Lands Director at a salary to be set consistent

with state policy and the position announcement; and that the Board fix the penal sum for the Director position fidelity bond at \$100,000.

Secretary Read stated that he appreciates the conversations that were had and the thoughtful process that led us to this point.

Treasurer Steiner and Governor Kotek echoed that statement.

Secretary Read made a motion to approve the action item.

Treasurer Steiner seconded the motion.

The item was approved at 10:06 a.m. without objection.

2. Appointment of an Interim Director of the Department of State Lands

Until a new Director is appointed by the State Land Board and takes the oath of office required in ORS 273.165 to enter upon the duties of the office, appointment of an Interim Director is necessary to ensure clear authority and responsibility for administration of the laws conferring powers or imposing duties upon the Department (including authorizing expenditure of funds and entering into contractual relationships).

Bill Ryan is prepared to serve as Interim Director, effective immediately, until a new Director is appointed by the State Land Board and takes the oath of office required in ORS 273.165.

Mr. Huntington recommended that Mr. Ryan be appointed Interim Director until the new director takes her position. This appointment would include a bond similar to the bond for the new director.

Secretary Read made a motion to approve the action item.

Treasurer Steiner seconded the motion.

The item was approved at 10:08 a.m. without objection.

Note: The August meeting will be cancelled due to lack of agenda items.

Treasurer Steiner asked that the Department give a status update regarding the Sandy River Delta that can be shared with the public.

The meeting was adjourned at 10:12 a.m.

Tina Kotek, Governor

, Director



Oregon

Tina Kotek, Governor

Department of State Lands

775 Summer Street NE, Suite 100

Salem, OR 97301-1279

(503) 986-5200

FAX (503) 378-4844

www.oregon.gov/dsl

State Land Board

State Land Board

Regular Meeting

October 14, 2025

Agenda Item 2

Tina Kotek

Governor

Tobias Read

Secretary of State

SUBJECT

Elliott State Research Forest Board of Directors

Elizabeth Steiner

State Treasurer

ISSUE

Whether the State Land Board should appoint three members to the Elliott State Research Forest Board of Directors.

AUTHORITY

- Oregon Constitution, Article VIII, Section 5, specifies the State Land Board is responsible for managing lands placed under their jurisdiction by law.
- ORS 273.045; authorizing the Department of State Lands to exercise the administrative functions of the State Land Board.
- Senate Bill 147, adopted in 2025 session.

BACKGROUND

The public Elliott State Research Forest (ESRF) is envisioned as a nationally important center for forest science and management that contributes to conservation, education, recreation, and local economies and supports Indigenous values.

The Elliott State Research Forest Board of Directors guides the Department's management of the research forest. An ESRF Board that includes diverse perspectives and experiences is essential to successfully managing a public research forest for multiple benefits and ensuring transparency and accountability. The ESRF Board's roles and responsibilities are outlined in the ESRF Oversight Structure (see Appendix A) approved by the Land Board in April 2024.

The ESRF Board consists of seven or nine voting members, each serving a four-year term. The inaugural members, appointed by the Land Board in 2024, are serving staggered terms of one, two, or three years. Those initial term lengths were staggered

to support building knowledge and strengthening relationships, while also ensuring regular opportunities to enhance the ESRF Board composition with new perspectives. All terms have an October end date.

Applications are accepted continuously and reviewed twice per year by a committee that includes Department staff and the current chair and vice-chair of the ESRF Board. The committee provides input to the Department Director, who drafts a recommendation for Land Board consideration.

OCTOBER 2025 APPOINTMENTS

Because inaugural ESRF Board members were appointed in 2024, the first appointments to four-year terms occur in October 2025. This appointment cycle also marks the first use of the application review and recommendation process described above, which was developed with input from the ESRF Board.

The review process highlighted important considerations regarding Tribal participation in governance of the research forest. Thoughtful discussion led to recognition that hearing directly from Tribes regarding representation is essential to respecting their sovereignty and relationships with these lands. The Department is exploring options for meaningful conversation, including government-to-government consultation.

To maintain a nine-member ESRF board while also allowing for Tribal engagement, the Department Director is recommending appointment of two candidates to four-year terms. The candidates, Haley Lutz and Payton Smith, are currently serving one-year terms on the ESRF Board. The Director is also recommending appointment of Dr. Ken Carloni to serve the remainder of a term ending in October 2027. Brief biographies for the recommended candidates are in Appendix B.

One four-year term remains unfilled. DSL will recommend filling this seat at the conclusion of the Tribal consultation. Currently, Mike Wilson, the ESRF Board member serving in a one-year term position, provides a valuable non-Tribal Indigenous perspective on the ESRF Board. DSL intends to continue his service until the conclusion of the Tribal consultation.

PUBLIC OUTREACH

Outreach aimed at encouraging potential candidates to submit applications and ensure a strong pool of applicants began on August 2, 2025, and included:

- A call for applications posted on the Department website, LinkedIn, and Instagram as well as the ESRF email list. A reminder was provided ahead of the September 7, 2025, deadline to be considered for October 2025 appointment. Due to technical challenges with the application portal, DSL extended the deadline to September 12th to ensure all applications were considered.

- Direct outreach to current ESRF Board members, as well as people and organizations interested in the research forest, encouraging sharing of information about the opportunity.
- Direct connection with potential candidates to encourage application.

RECOMMENDATION

The Department Director recommends the Land Board appoint the following candidates to the terms listed below, subject to a positive background check:

- Payton Smith – Four-year term (ending October 2029)
- Haley Lutz – Four-year term (ending October 2029)
- Ken Carloni – Remainder of a three-year term (mid-term vacancy, ending October 2027)

APPENDIX

- A. Elliott State Research Forest: Oversight Structure (April 9, 2024)
- B. Recommended ESRF Board Candidates (October 14, 2025)

Elliott State Research Forest Oversight Structure

For the purpose of safeguarding public oversight, accountability and transparency in the administration of the Elliott State Research Forest (ESRF), the State Land Board on April 9, 2024 approved the following structure for an ESRF Board of Directors (ESRF Board) to guide management of the ESRF by the Department of State Lands (DSL).

The ESRF Board will function in an advisory capacity to DSL based on existing statutory authorities, delegated responsibilities and direction from DSL and the State Land Board. This document is divided into three primary sections:

1. State Land Board roles and duties related to the ESRF, ESRF Board membership and appointment;
2. DSL responsibilities; and
3. ESRF Board duties and responsibilities.

Future changes to this Oversight Structure will follow this process:

- Revisions relevant to Section 1 (ESRF Mission, Management Policies, and State Land Board responsibilities) may be made based on State Land Board review and approval.
- Revisions relevant to Sections 2 and 3 (DSL and ESRF Board responsibilities) may be made based on mutual agreement between DSL and the ESRF Board.
 - If such mutual agreement exists, DSL will notify the State Land Board of the changes at its next scheduled meeting, and State Land Board approval need not occur provided that the changes agreed upon by DSL and ESRF Board are consistent with State Land Board direction.
 - If DSL and the ESRF Board do not reach mutual agreement over a proposed change, either entity may seek State Land Board guidance and resolution.

Section 1: State Land Board Roles

A. ESRF Mission

The State Land Board's mission for the Elliott State Research Forest is the creation of an enduring, publicly owned, world-class research forest that:

(1) Advances and supports forest health, climate resilience, carbon sequestration, biodiversity conservation, recovery of imperiled species, water quality and quantity, recreational opportunities and local economies as well as scientific research that improves knowledge related to forest management's role in achieving these qualities.

(2) Is managed to promote collaboration, partnerships, inclusive public processes and equity, consistent with:

- (A) The management policies in Subsection B below;
- (B) An applicable habitat conservation plan approved pursuant to the federal Endangered Species Act of 1973 (P.L. 93-205, 16 U.S.C. 1531 to 1544); and
- (C) A forest management plan approved by the State Land Board.

B. ESRF Management Policies

The State Land Board's management policies for the ESRF are to:

- (1) Further the mission described in subsection (A) of this section.
- (2) Support scientific inquiry.
- (3) Allow public access for recreational and educational purposes that is compatible with scientific and conservation purposes, and the mission and management policies described in this section.
- (4) Advance long-term, operational-scale research on issues including forest management practices, ecosystem function, biodiversity, habitat conservation, water quality and quantity, carbon sequestration, rural livelihoods and the resilience of forests to the impacts of climate change.
- (5) Support rural economies through active forest management, timber harvest and other forest products, recreation, research, habitat restoration and related jobs.
- (6) Improve the ecological health of the forest through conservation and restoration measures relevant to habitat, biodiversity, carbon and climate resilience outcomes;
- (7) Promote opportunities at all education levels to interact with the forest and advance public understanding of the ecological, economic and social benefits of healthy forest ecosystems.
- (8) Seek active partnerships with Tribal governments to:
 - (A) Research and demonstrate traditional and contemporary Tribal cultural practices and ecological knowledge related to forest management.
 - (B) Provide opportunities for Tribal governments and Tribal members to harvest traditional forest products and engage in traditional Tribal cultural practices related to the forest.

(C) Consult on potential impacts on natural, cultural and traditional resources in the forest.

(9) Maintain a financially self-sufficient forest management entity and structure capable of operating and overseeing the forest and necessary infrastructure.

(10) Prioritize collaborative partnerships that recognize both the local and statewide values the forest provides.

(11) Maintain a high level of public accountability and transparency in forest management decisions and operations.

C. ESRF Guidance and Decision Responsibilities

Consistent with the ESRF's mission and management policies, the State Land Board will provide the following to DSL and the ESRF Board:

(1) Policy guidance.

(2) Feedback on DSL's biennial programmatic reports.

(3) Approval or denial of:

(A) A forest management plan, and any amendments thereof.

(B) Any amendments to the habitat conservation plan, prior to submittal to federal or state regulatory agencies.

(C) Any expansion of lands in the forest, or exchange of lands in the forest or timber on the lands.

D. ESRF Board Membership and Appointment Process

The State Land Board will appoint voting members to the ESRF Board. The ESRF Board shall consist of seven or nine voting members and a person designated by the lead research entity for the ESRF, who shall be a nonvoting member.

(1) The State Land Board shall:

(A) Appoint the voting members for terms of four years and for not more than two consecutive terms, except as set forth below in subsection 5.

- (B) Fill any vacancy among the voting members by appointing a voting member to serve the remainder of the unexpired term.
 - (C) Consult with, and consider input from, the primary ESRF research partner and the existing ESRF Board when determining whom to appoint to the ESRF Board.
 - (D) Endeavor to appoint members who have a full complement of relevant experience or expertise in subjects related to the mission and management policies and operations of the research forest, and demonstrated interest in the success of the mission and management policies of the forest as a research forest.
- (2) ESRF Board Members are not entitled to compensation but may receive reimbursement by DSL of their actual and necessary travel and other expenses incurred in the performance of their official duties, to the extent allowed by applicable law.
- (3) On or before June 1, 2024, the DSL Director will develop a list of candidates for appointment as the first voting members of the ESRF Board.
- (4) The State Land Board intends to appoint the first voting members of the ESRF Board from a list of candidates at its June 2024 meeting.
- (5) Notwithstanding section 1(a) above:
- (A) Of the voting members first appointed by the State Land Board:
 - (i) Three shall serve for a term ending one year after the date of the appointment.
 - (ii) Two shall serve for a term ending two years after the date of the appointment.
 - (iii) Two shall serve for a term ending three years after the date of the appointment.
 - (iv) If there are nine members, three shall serve for a term ending two years after the date of the appointment, and three shall serve for a term ending three years after the date of the appointment.
 - (B) A voting member serving a term described in this subsection, or serving the remainder of an unexpired term resulting from vacancy referred to in Subsection 1(B), may be appointed to serve two additional consecutive terms.

Section 2: DSL Responsibilities

- (1) DSL shall advance ESRF management in a manner consistent with the mission and management policies of Section 1 above, including in compliance with an approved habitat conservation plan, forest management plan, or other plans or direction referenced in Section 3(2)(A)-(N) below.
- (2) DSL will safeguard public transparency, accountability and participation in decision-making related to the ESRF by ensuring the ESRF Board complies with Oregon Public Meetings Laws, ORS 192.610 to 192.705 and by advancing the following:
- (A) Provide opportunities for public comment at each ESRF Board meeting.
 - (B) Provide ESRF Board members with copies of written public comments before the ESRF Board acts.
 - (C) Provide the public with written materials as well as a public review and comment opportunity on items listed in Section 3(2)(A)-(N). For any proposed biennial operations plans, forest management plan or related amendments, or amendments to the habitat conservation plan, at least 45 days will exist for public comment before the ESRF Board votes on any recommendations related to such plans.
 - (D) Conduct at least five meetings of the ESRF Board per year for which public participation is facilitated.
- (3) DSL will adopt the recommendations of the ESRF Board to the fullest extent possible, especially if offered with full consensus of the ESRF Board, unless DSL determines the ESRF Board recommendation is inconsistent with state law, inconsistent with State Land Board or DSL policy, or other reasons exist for making a different decision. DSL will respond to ESRF Board Recommendations within 30 days. If DSL does not adopt the advice or recommendations of the ESRF Board, DSL will articulate its reasons to the ESRF Board in writing concurrent with the Department's decision.

Section 3: ESRF Board Duties & Responsibilities

- (1) The ESRF Board shall advise the DSL Director and ESRF Forest Manager, and advance recommendations if it has them, on the following:
- (A) Evaluation, or contract for evaluation, of whether management of the forest (operational planning, implementation, monitoring and reporting) is being effectively integrated with a lead research entity or entities.

(B) Evaluation of whether the mission and management policies for the Elliott State Research Forest are being effectively implemented.

(C) The operational and fiscal integrity of the ESRF.

(D) The hiring of an ESRF forest manager as well as delegation of responsibilities to this position.

(E) The scope of biennial operations plans.

(F) The advancement and/or implementation of operations and research programs, whether prospective (based on proposed programs) or retrospective (based on ongoing or past implementation of programs).

(2) After considering public comments received in response to the Department's circulation of materials related to items below, as well as any further input the ESRF Board solicits, the ESRF Board shall advise the ESRF Forest Manager and/or DSL Director with recommendations on:

(A) Department budgets for the ESRF, including related to its Agency Request Budget.

(B) Biennial operations reports.

(C) Biennial operations plans.

(D) Proposed research plans or programs.

(E) Recreation plans.

(F) Education plans.

(G) A forest management plan.

(H) Any sale of carbon credits or entry into easements or other encumbrances of lands in the forest.

(I) Any expansion or exchange of lands in the forest.

(J) Any amendments to a habitat conservation plan related to the forest

(K) Any proposed amendments to the Elliott State Research Forest Proposal.

(L) Any other submission to federal or state agencies that relates to revising or clarifying ESRF management or policy direction.

(M) Any proposed receipt of funds, including bequests, or funding requests made to the federal government, private sector, state agencies or the Legislative Assembly not otherwise covered in subsection 2(A), including any request for issuance of revenue bonds, certificates of participation financing, or state-funded debt service.

(N) Any other plans or decisions DSL intends to make of significance to advancement of or compliance with the ESRF's mission and management policies.

(3) In advancing oversight, advice or recommendations, the ESRF Board shall review DSL proposals, plans, reports or other information submitted to it (by DSL, the public or otherwise) relevant to the subject matter in subsections (1) and (2) above. While DSL and the State Land Board have responsibility for decisions on plans, amendments, or other decision areas referenced in subsection (1) and (2), the ESRF Board's review and any advice or recommendations related to those subsections will focus on and strive to ensure consistency with the direction and intent of the applicable Forest Management Plan, Habitat Conservation Plan, research direction, or overall mission and management policies of the ESRF.

(4) The ESRF Board shall also:

(A) Review DSL's biennial or other programmatic reports to the State Land Board on the ESRF and may provide recommendations to the State Land Board on the DSL reports.

(B) Promote transparency around decisions concerning the forest, including forums to provide public input in association with ESRF Board meetings or separately.

(5) The ESRF Board may also:

(A) Form advisory bodies or subcommittees as the Board deems necessary and appropriate.

(B) Request that DSL pursue funding of ESRF operations and/or research through state-issued bonds, certificates of participation or similar instruments as well as other opportunities identified by the ESRF Board.

Elliott State Research Forest Board Appointments

Department of State Lands Director's Recommended Candidates: October 2025

Recommended Candidate Biographies

HALEY LUTZ

Haley Lutz is an Oregon coast native, born in North Bend. She is the Executive Director of the Coos Watershed Association (CoosWA), a locally organized, non-regulatory organization that has been leading innovative science, restoration, monitoring, and education programs with the Coos watershed community since 1994. CoosWA has a deep interest in the Elliott and related partnerships and is pleased to have served on the Elliott State Research Board of Directors during the last year. Haley holds a Master of Studies in Environmental and Natural Resource Law from Lewis and Clark Law School. Before coming to CoosWA, she worked for the Oregon Department of Fish and Wildlife, interned with NOAA Fisheries working on the Oregon Coast Coho Recovery Plan, and led a watershed council on the North Coast. In her spare time, she enjoys fishing, bow hunting, swimming, exploring the outdoors, and trying to keep up with her wild toddler.

PAYTON SMITH

Born and raised in North Bend, Payton Smith spent much of her youth growing up on the Elliott. After graduating from college at the University of Oregon, she worked for Roseburg Forest Products in Springfield before moving home to Coos Bay. Payton serves as the Director of Communications and Government Affairs for Southport Lumber. Her job connects her with South Coast community and economic vitality efforts in many ways. She also serves on the board of directors for the Judith Ann Mogan Foundation as well as the American Forest Resource Council.

KEN CARLONI

Ken Carloni holds a Ph.D. in Forest Ecology from Oregon State University, where his research focused on The Ecological Legacy of Indian Burning Practices in Southwest Oregon. He was an Associate Professor of Biology and Natural Resources at Umpqua Community College from 1987 to 2018, chairing the Science Department from 2012 to 2018. Ken currently is the Vice President of the Yew Creek Land Alliance, Inc. (YCLA), a nonprofit in Southwest Oregon that manages a diverse 380-acre landscape with a mission that includes conservation, restoration, education, and recreation. From 2018 to 2022 the YCLA completed the first multi-acre biochar project ever funded by the Natural Resources Conservation Service; this project restored 32 acres of oak habitat while converting 12 acres of thinning slash to biochar. YCLA restoration projects have now sent more than 200 MBF of timber to local mills while demonstrating innovative regenerative forestry practices. Ken is currently collaborating with researchers and community groups on a grant proposal to test biochar's efficacy in mitigating toxic algal blooms in Tenmile Lake near the ESRF.

Current Board Member Biographies

JENNIFER ALLEN

Jennifer Allen recently retired from Portland State University (PSU), where she was the Portland Professor of Environment and Natural Resources in the Mark O. Hatfield School of Government. She previously served as director of PSU's Institute for Sustainable Solutions. Jennifer served on the prospective board for the Elliott State Research Forest and chaired the Science Advisory Panel associated with earlier ESRF development efforts. She has also served as a commissioner and chair on the Oregon State Parks Commission as well as on the boards of several nonprofits. Jennifer offers knowledge and experience related to governance, research, and organizational development that would be of value to the ESRF board. Jennifer holds a Ph.D. in Environmental Science and Public Policy from George Mason University, a Master of Environmental Management from Yale School of Forestry and Environmental Studies, and a BA in American Studies from Yale University.

MELISSA CRIBBINS

Melissa Cribbins is a small business owner and an attorney. A former Coos County Commissioner, Melissa is currently a member of the Environmental Protection Agency's Local Government Advisory Council and is past Chair of the National Association of Counties' Energy, Environment and Land Use Committee. Prior to her election in 2012, she worked for the Coquille Indian Tribe as in-house counsel for six years. She is a member of the Oregon State Bar, the Confederated Tribes of the Coos, Lower Umpqua, and Siuslaw Indians Bar, and the Washington State Bar, and she also serves as a tribal judge. She has served on multiple boards and committees, including the Elliott State Research Forest Advisory Committee, the Board of Directors for the Association of Oregon Counties, and the Board of Directors for Energy Trust of Oregon. Melissa is a graduate of Portland State University and Gonzaga University.

PETER HAYES

Peter Hayes and his family own and care for Hyla Woods in the northern Oregon Coast Range where they experiment with what is needed to grow forests that are ecologically complex and resilient, economically sufficient, and culturally helpful. Building on 170 years of family work in forestry and sawmilling, Peter's public involvements include past service on the Oregon Board of Forestry, co-founding and leadership of the Build Local Alliance, and coordination of the NW Innovative Forestry Summit.

MIKE KENNEDY

Mike Kennedy recently retired as the Natural Resources Director for the Confederated Tribes of Siletz Indians, where he was responsible for operation of the Tribal Forestry, Aquatics, Wildlife, Hunting & Fishing, Realty and Environmental Protection programs. Prior to that role, he served as the Tribe's Forester and Presales Forester and spent 8 seasons as a Forestry Technician on the Ochoco National Forest. All told, he has dedicated his career to forest management for 44

years and continues to remain engaged in these issues while living in Siletz, Oregon. Mike holds a Bachelor of Science degree in Forest Management from the State University of New York College of Environmental Science and Forestry. In addition to serving on the Elliott State Research Forest Board, he has served on the Siuslaw National Forest Resource Advisory Committee, the BLM Western Oregon Resource Advisory Committee, the Oregon Department of Forestry State Forests Advisory Committee, and the Oregon State University McDonald-Dunn Research Forest Stakeholder Advisory Committee.

KEITH TYMCHUK

Keith Tymchuk is a lifelong resident of Reedsport. A graduate of the University of Oregon and Oregon State University, he has been an educator for 42 years, the last 40 at Reedsport High School teaching Government, History, Psychology and English. He served six terms as Reedsport's mayor, has been a Port of Umpqua Commissioner for 28 years and serves as the Regional Solutions Convener for Douglas, Coos, and Curry Counties. He is currently the President of the Board of Directors for Central Lincoln PUD. Keith also has been involved in projects as diverse as Wave Energy, Community Forests, and the Oregon Coast Trail. Keith served on the Elliott State Research Forest Advisory Committee since its inception in 2019. He is an avid reader and enjoys hunting, fly fishing and golfing in his free time.

MICHAEL WILSON

Michael Wilson served as the Natural Resource Department Director for the Grand Ronde Tribe (now retired), where he managed forestry and Indigenous stewardship approaches and programs on the Tribe's forestlands. He has also served on many state and federal committees and planning efforts where he has engaged in forest policy and tribal representation. Currently, he serves as a board member of the Oregon Agricultural Trust and Board Chair of the Polk Soil and Water Conservation District. Mike is a Grand Ronde Tribal member and brings valuable knowledge and experience of tribal forest operations and management. He continues to work on several projects that promote tribal rights and representation. Mike worked and recreated around the Elliott early in his career and worked as part of representation of Grand Ronde Tribal interests in the original Elliott advisory committee. Mike holds an MBA from George Fox University and Business/Environmental Studies from Linfield College.



Oregon

Tina Kotek, Governor

Department of State Lands

775 Summer Street NE, Suite 100

Salem, OR 97301-1279

(503) 986-5200

FAX (503) 378-4844

www.oregon.gov/dsl

State Land Board

Tina Kotek

Governor

Tobias Read

Secretary of State

Elizabeth Steiner

State Treasurer

M E M O R A N D U M

Date: October 14, 2025

To: Governor Tina Kotek
Secretary of State Tobias Read
State Treasurer Elizabeth Steiner

From: Kaitlin Lovell
Director

Subject: Common School Fund Review (Item 3)

The Oregon Investment Council formulates policies for the investment and reinvestment of funds under the control and administration of the Department of State Lands, known as the Common School Fund. This investment policy provides guidance to Oregon State Treasury staff and advisors regarding approved asset classes, asset allocation, and reporting requirements for the Common School Fund.

The investment objective for this fund is to maximize risk-adjusted return, while remaining consistent with goals as established by the State Land Board to generate returns in support of funding education for Oregon's school kids.

At the Land Board meeting, the Oregon State Treasury will be presenting on the performance of the Common School Fund's investments as of June 30, 2025.

The key items that will be addressed:

- Fund Objectives
- Fund Evolution
- Fund Asset Allocation
- Fund Performance
- Accomplishments & Strategic Priorities
- Fund Net Asset Value

Common School Fund Distribution Policy Objective

The Common School Fund distributes 3.5% of the average net asset value over the trailing three years to the Department of State Lands, which in turn distributes those funds to the Department of Education in support of Oregon's K-12 education programs. In addition, with the passage of SB 1566, certain funds (subject to a formula) are distributed to the State to pay down some of the unfunded PERS liability.

APPENDICES

- A. Common School Fund: Annual Review (October 14, 2025)

October 14, 2025

Common School Fund Annual Review

Louise Howard

Director of Capital Markets

Jamie McCreary

Service Model Program Manager



OREGON
STATE
TREASURY



Agenda

Fund Objectives	Page 3
Fund Evolution	Page 4
Total Fund Asset Allocation	Page 5
Total Fund Performance	Pages 6 - 7
Accomplishments & Strategic Priorities	Page 8
Total Fund Net Asset Value (NAV)	Page 9
Appendix: Asset Class Performance	Page 10 - 11

Fund Objectives

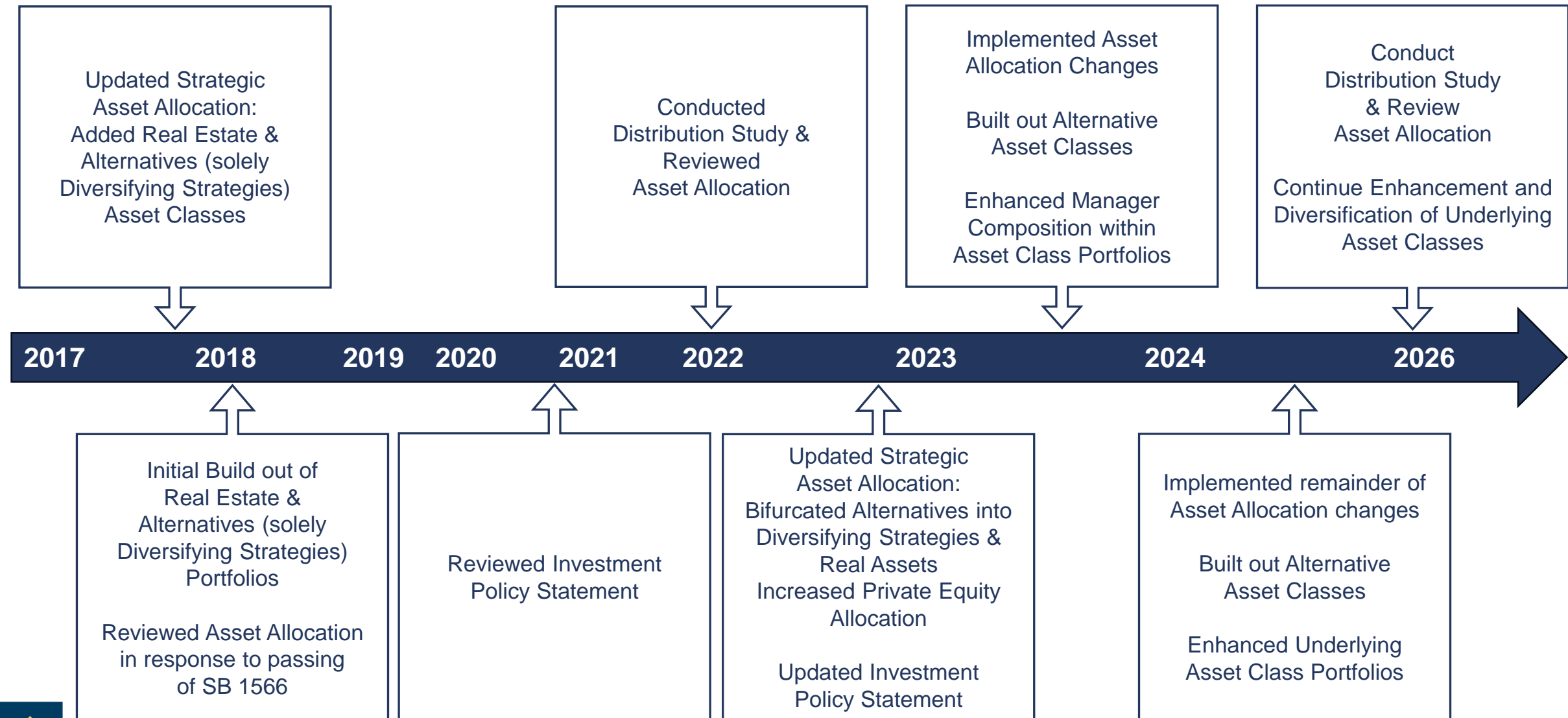
Investment Policy

- The Oregon Investment Council (OIC) formulates policies for the investment of funds under the control and administration of the Department of State Lands, known as the Common School Fund (the Fund)
- Investment policy provides guidance to Oregon State Treasury staff and investment consultants regarding approved asset classes, asset allocation, and reporting requirements
- The primary objective of the Common School Fund is to generate a real (inflation-adjusted) rate of return that is sufficient to support the mission of the Fund and its spending needs into perpetuity

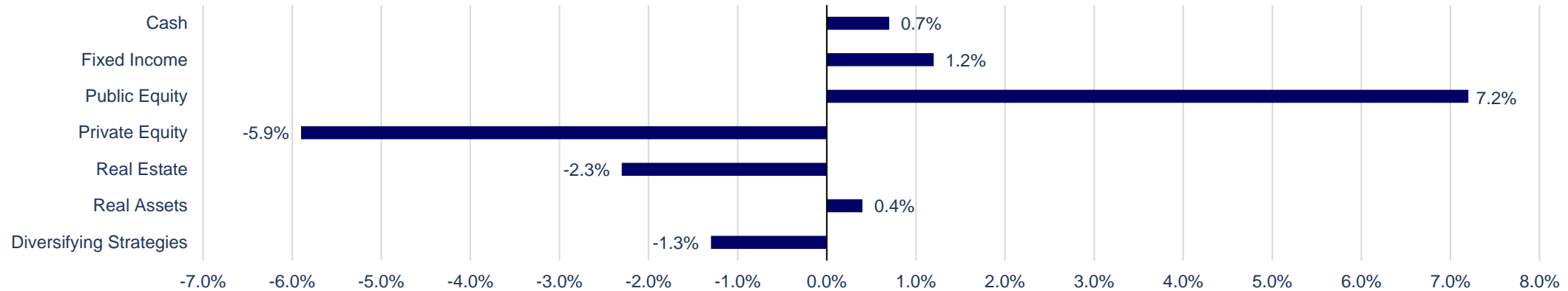
Distribution Policy

- On an annual basis, the Common School Fund distributes 3.5% of the Fund's trailing three-year average market value to the Department of Education to support the State's K-12 education programs
- In addition, with the passage of SB 1566, certain funds (subject to a formula) are distributed to the School Districts Unfunded Liability Fund

Fund Evolution



Total Fund Asset Allocation



Asset Class	Market Value	Current Allocation	Interim Target	Long-Term Target	Active Weight	Approved Range
Cash	\$19.5M	0.7%	0.0%	0.0%	0.7%	0%- 3%
Fixed Income	\$623.7M	23.7%	22.5%	20.0%	1.2%	15%- 25%
Public Equity	\$1.4B	54.7%	47.5%	45.0%	7.2%	40%- 50%
Private Equity	\$173.8M	6.6%	12.5%	15.0%	-5.9%	10%- 20%
Real Estate	\$201.5M	7.7%	10.0%	10.0%	-2.3%	5%- 15%
Real Assets	\$75M	2.9%	2.5%	5.0%	0.4%	0%- 10%
Diversifying Strategies	\$98M	3.7%	5.0%	5.0%	-1.3%	0%- 10%
Total Fund	\$2.6B	100%				



Performance – Total Fund

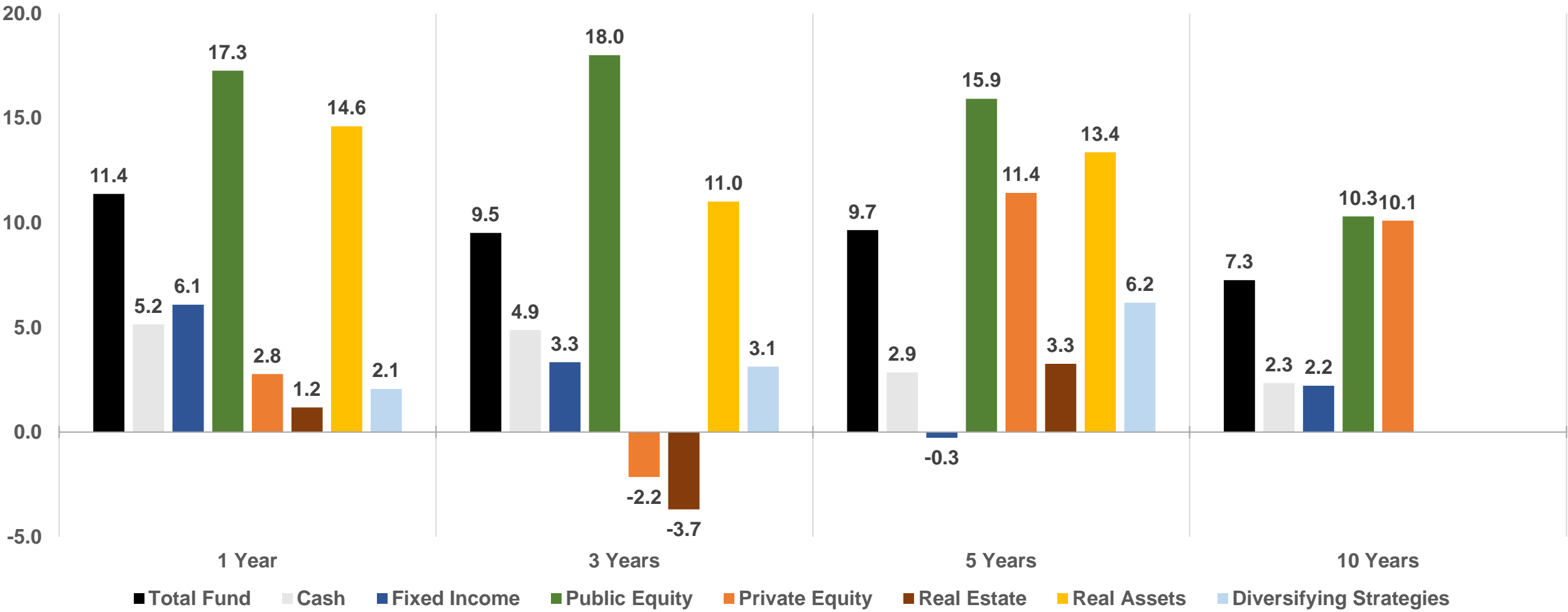
- For the year, the Common School Fund returned 11.4%, outperforming its benchmark and mixed for trailing time frames
- All asset classes generated positive returns and majority of them outperformed their benchmarks for the 1 year

	Market Value	3 Months	1 Year	3 Years	5 Years	10 Years
Total Fund	\$2.6B	6.9%	11.4%	9.5%	9.7%	7.3%
Policy Benchmark		5.4%	10.8%	10.1%	9.2%	7.6%
Excess Return		1.5%	0.5%	-0.6%	0.5%	-0.4%

Total Fund	Long-Term Target
10-Year Expected Nominal Return	7.1%
10-Year Expected Standard Deviation	12.5%



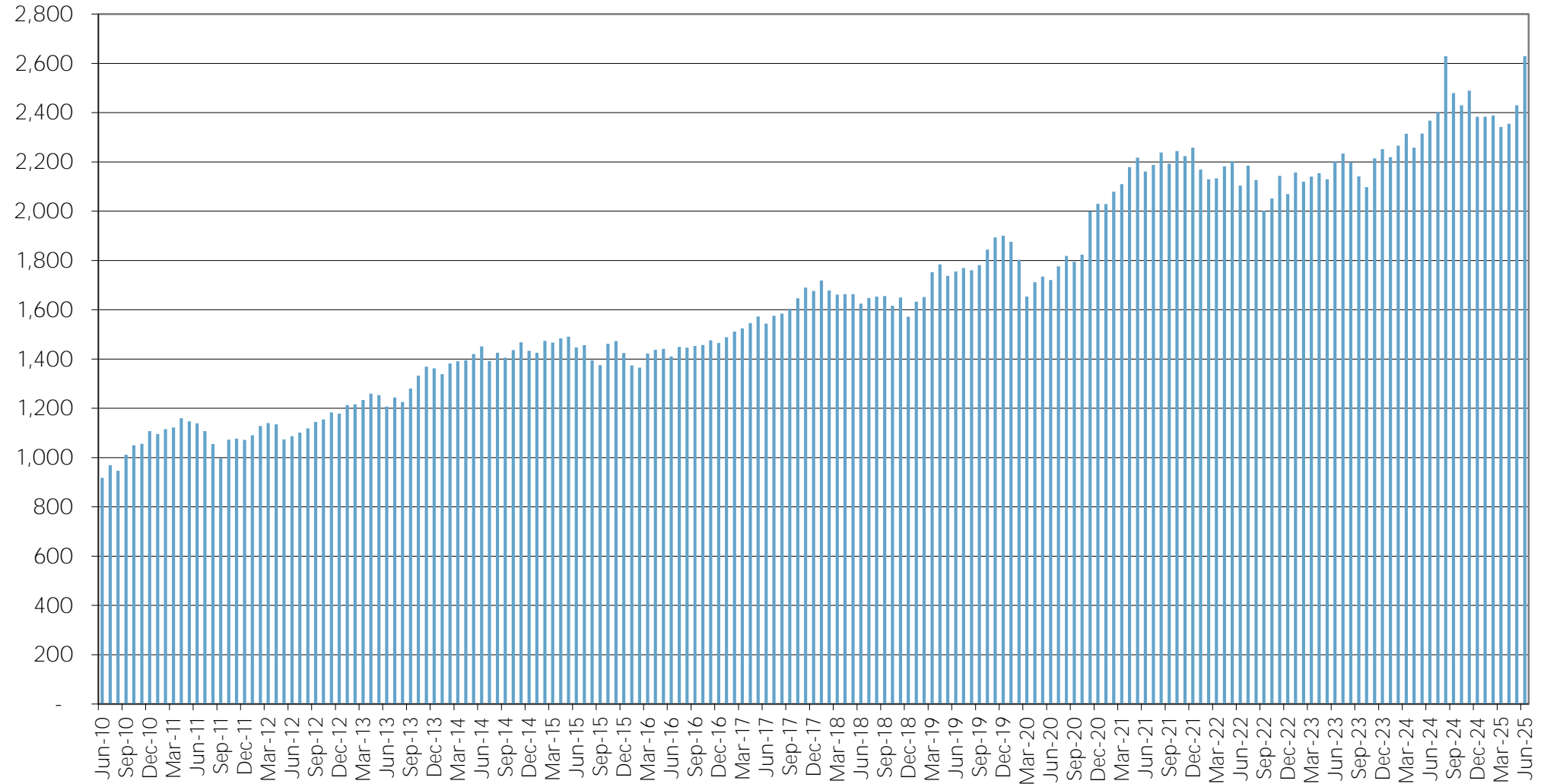
Net Annualized Performance (%)



Accomplishments and Strategic Priorities

- Annual PERS distribution 1/2025 (~\$77M)
- Unclaimed Property contribution 5/2025 (~\$164M)
- Department of Education distributions 12/2024 and 6/2025, totaling (~\$76M)
- Finalized Investment Guidelines in 2025
- Asset Allocation study in 2026
- Continue implementing new asset allocation (approved by the OIC in 2022) - notably funding up Real Estate, Real Assets and Private Equity, while reducing Public Equity and Fixed Income
- Working with asset class teams and committees to review portfolio construction and refine investment manager composition

CSF NAV
15 years ending June 30, 2025
(\$ in Millions)



Appendix: Asset Class Performance



OREGON
STATE
TREASURY

	Market Value	Current Allocation	3 Months	1 Year	3 Years	5 Years	10 Years
Cash	\$19.5M	0.7%	1.2%	5.2%	4.9%	2.9%	2.3%
91 Day T-Bills			1.0%	4.7%	4.6%	2.8%	2.0%
Excess Return			0.1%	0.5%	0.3%	0.1%	0.4%
Fixed Income	\$623.7M	23.7%	1.2%	6.1%	3.3%	-0.3%	2.2%
BBG US Aggregate			1.2%	6.1%	2.6%	-0.7%	1.7%
Excess Return			0.0%	0.0%	0.8%	0.5%	0.5%
Public Equity	\$1.4B	54.7%	11.7%	17.3%	18.0%	15.9%	10.3%
MSCI ACWI IMI (Net)			11.6%	15.9%	16.8%	13.4%	9.7%
Excess Return			0.1%	1.4%	1.2%	2.5%	0.6%
Private Equity	\$173.8M	6.6%	1.7%	2.8%	-2.2%	11.4%	10.1%
Russell 3000 +300bps (Qtr Lag)			-4.0%	10.4%	11.3%	21.6%	15.1%
Excess Return			5.7%	-7.7%	-13.4%	-10.1%	-5.0%
Real Estate	\$201.5M	7.7%	1.2%	1.2%	-3.7%	3.3%	N/A
NCREIF ODCE (Custom) (Adj.)			0.9%	1.2%	-5.1%	2.0%	N/A
Excess Return			0.4%	0.0%	1.4%	1.3%	N/A
Real Assets	\$75M	2.9%	6.9%	14.6%	11.0%	13.4%	N/A
CPI +4%			1.9%	6.8%	6.9%	8.7%	N/A
Excess Return			5.1%	7.8%	4.1%	4.7%	N/A
Diversifying Strategies	\$98M	3.7%	0.8%	2.1%	3.1%	6.2%	N/A
HFRI FOF- Conservative Index			2.0%	5.7%	5.4%	6.2%	N/A
Excess Return			-1.2%	-3.6%	-2.3%	0.0%	N/A

APPENDIX A



Oregon State Treasury Team



OREGON
STATE
TREASURY

Louise Howard
Director of Capital Markets
Tenure: 2022

As the Director of Capital Markets, Louise oversees multiple asset class teams and their respective OPERF portfolios, including Public Equity, Fixed Income, and Diversifying Strategies. She also Co-leads the Common School Fund, SAIF and Oregon Savings Growth Plan.

- ❖ Chairs Capital Markets Leadership Committee
- ❖ Leads monitoring and evaluation efforts for external investment managers
- ❖ Evaluates portfolio structure and makes recommendations to improve risk-adjusted returns
- ❖ Responsible for managing and coordinating the liquidity needs of OPERF
- ❖ Participates in private market Committee Meetings (Real Estate, Private Equity, Alternative, and Opportunistic)
- ❖ Leads the oversight of Public Equity programs, including internal and external investment strategies

Education & Certifications: BA University of New Orleans, MBA University of New Orleans, CFA Charterholder, CAIA Charterholder



Jamie McCreary
Service Model Program Manager
Tenure: 2023

As the Service Model Program manager, Jamie is responsible for creating and/or maintaining centralized services model standards and manages all aspects of client account relationships with various state managed programs.

- ❖ Ongoing monitoring and oversight of state managed programs and investment portfolios
- ❖ Supports the application of industry and fiduciary best practice standards across all areas of the Investment Program
- ❖ Investment Policy Statement Review

Education: BS Southern Oregon University, CERTIFIED FINANCIAL PLANNER™ professional



Wil Hiles
Investment Officer
Tenure: 2016

As Investment Officer, Wil supports the Public Equity team's day-to-day activities surrounding OPERF. Wil also Co-Leads the Oregon Common School Fund.

- ❖ Monitors and evaluates current and prospective investment managers
- ❖ Evaluates portfolio structure and makes recommendations to improve risk-adjusted returns
- ❖ Coordinates new account fundings, terminations, portfolio transitions, and cash raise activity
- ❖ Serves as internal equity portfolio manager and trader
- ❖ Conducts market research and analysis

Education: BA in Finance from Linfield College; Master of Science in Finance (MSF) from Pacific University



Endnotes

- Source: State Street. Performance is net of investment management fees and annualized for periods longer than one year. Reminder alternative data is typically lagging 1-3 months.
- Oregon CSF Policy Index:
 - From February 1, 2012 to June 30, 2016, policy benchmark was 30% Russell 3000, 30% MSCI ACWI ex US Net, 30% BC Universal Index, and 10% Russell 3000+300 bps QTR lag. From July 1, 2016 to December 31, 2017, policy benchmark was 30% Russell 3000, 30% MSCI ACWI ex US Net, 30% BC US Aggregate, and 10% Russell 3000+300 bps QTR lag. From January 1, 2018 to December 31, 2022 policy benchmark was dynamically weighted and uses each asset class' value relative to the total market value as its percentage of the total policy benchmark.
 - From January 1, 2023 to present, policy benchmark is 47.5% MSCI ACWI IMI Net (Daily), 12.5% Russell 3000+300 bps quarter lag, 22.5% BBG US Agg, 10% NCREIF ODCE (Custom) (Adj.), 2.5% CPI +4%, and 5% HFRI FOF: Conservative Index.
- Oregon CSF FI Index:
 - Prior to November 1, 2005, index is BC Aggregate. From November 1, 2015 to June 30, 2016 the benchmark was BC Universal Index.
 - From July 1, 2016 to present the benchmark is BBG Aggregate
- Real Estate policy index- NCREIF ODCE (Custom) (Adj.):
 - From January 1, 1990 to March 31, 2016, the NCREIF ODCE (Custom) was weighted 100% NCREIF Property Index QTR Lag. From April 1, 2016 to present, the benchmark is weighted 100% - NFI-ODCE QTR LAG Net of Fees. Starting July 1, 2017, methodology for monthly return is calculated by geometrically linking prior months returns and then deriving the monthly returns by calculating the geometric average. Returns are not actual monthly, but rather equivalent for all intra-quarter months, in order to match the actual quarterly return.
- Private Equity policy index- Russell 3000 + BPS QRT LAG (Adj.):
 - Prior to May 1, 2005, index is R3000+500 bps, Qtr Lag. Until June 30, 2017 the index is R3000+300 bps, Qtr Lag. From July 1, 2017, the monthly return is calculated as the geometrically linked monthly portion of the quarterly return. Returns are not actual monthly, but rather equivalent for all intra-quarter months, in order to match the actual quarterly return.
- Any information provided herein has been prepared from sources believed to be reliable but is not guaranteed and is for informational purposes only. The information provided herein should not be regarded as an offer to sell or as a solicitation of an offer to buy the products mentioned. No representation is made that any returns will be achieved. Past performance is not indicative of future results. Opinions expressed herein are subject to change without notice.





**OREGON
STATE
TREASURY**

Elizabeth Steiner, MD
Oregon State Treasurer

16290 SW Upper Boones Ferry Road
Tigard, OR 97224

oregon.gov/treasury



Oregon

Tina Kotek, Governor

Department of State Lands

775 Summer Street NE, Suite 100

Salem, OR 97301-1279

(503) 986-5200

FAX (503) 378-4844

www.oregon.gov/dsl

State Land Board

Tina Kotek

Governor

Tobias Read

Secretary of State

Elizabeth Steiner

State Treasurer

M E M O R A N D U M

Date: October 14, 2025

To: Governor Tina Kotek
Secretary of State Tobias Read
State Treasurer Elizabeth Steiner

From: Kaitlin Lovell
Director

Subject: Oregon Ocean Science Trust Report (Item 4)

Established by the Oregon State Legislature in 2013, the Oregon Ocean Science Trust secures and distributes funding to promote ocean and coastal knowledge, research, and monitoring to ensure the sustainable use of Oregon's resources, enhance coastal resilience, and support long-term ocean health for all Oregonians.

The Trust is comprised of seven members: the State Land Board appoints five voting members, and the President of the Senate and the Speaker of the House each appoint one nonvoting legislative member.

The Trust will provide the Land Board with an update on accomplishments during the 2023-25 biennium and outline next steps in advancing their goals.

APPENDICES

- A. Oregon Ocean Science Trust: 2023 – 2024 Annual Report
- B. Oregon Ocean Science Trust: Summer 2024 Update

2023-2024 Annual Report



OREGON OCEAN
SCIENCE TRUST

Table of Contents

A Message from the Trust Board Chair.....	3
Our Board	4
Advancing Ocean and Coastal Science in Oregon – Bi-Annual Achievements.....	5
A Peek at the Next Two Years	8
Partners Make a Difference.....	9
Funders and Donors.....	10
How You Can Make a Difference and Support the Trust.....	11



A Message from the Trust Board Chair

Growing up on the Oregon and Washington coast, the ocean has always been part of my life. I carry this connection forward with a deep sense of responsibility in my role as Chair of the Oregon Ocean Science Trust. Through the lens of a commercial fishing family and then as a seafood business owner, I've seen firsthand how coastal communities rely on strong science to sustain livelihoods, protect ecosystems, and adapt to change. I'm honored to share this report on the Trust's progress as we work together toward a future where both people and the ocean can thrive.

Our progress is grounded in a clear set of beliefs about the role of science in shaping Oregon's ocean future. These principles guide everything we do:

- **Good decisions start with good science.** Whether it's managing fisheries, preparing for coastal hazards, supporting marine industries, or protecting ocean ecosystems, science is the foundation for sound policy, responsible use, and long-term resilience.
- **Oregon needs science that serves.** At the Trust, we invest in applied research with purpose—science that solves problems and supports people. Our work generates the data, insights, and tools needed by coastal planners, tribal nations, fishermen, business owners, and state leaders. We are laser-focused on delivering knowledge that can be used, today and into the future.
- **The value of ocean science is not abstract.** It protects lives, fuels innovation, and strengthens coastal economies. In an era of climate disruption, it is essential infrastructure—just as vital as roads, ports, and energy systems. Our coastal communities deserve the best information available to plan, adapt, and thrive.
- **Oregon has a special responsibility to steward the ocean on behalf of the nation.** The ocean provides nutritious, sustainable food, helps cool the planet through carbon sequestration, and supports global biodiversity. These benefits transcend state borders and serve people across the nation and around the world.

Looking ahead, we are proud to be a co-leader, with the California Ocean Science Trust, in the emerging **West Coast Ocean Science Action Agenda**, an opportunity to move beyond fragmented, state-by-state approaches to a comprehensive region-wide approach that amplifies the greatest ocean and coastal science and data needs and priorities. This initiative gives us the chance to build a unified strategy for ocean science investment—one that secures the infrastructure, talent, and innovation our region needs to lead in the blue economy and safeguard our shared ocean legacy.

Thank you for your partnership and support. The work ahead is ambitious—but with science, strategy, and shared purpose, Oregon is ready to lead.

Warm regards,



Laura Anderson

Our Board

VOTING MEMBERS



Chair Laura Anderson
Founder, Local Ocean Seafoods (Newport, OR)



Dr. Keith Wolf
KWA Ecological Sciences & Documentary Films (Portland, OR)



Dr. Karina Nielsen
Director, Oregon Sea Grant (Corvallis, OR)



Dr. Theodore DeWitt
Marine Ecologist (Seal Rock, OR)



Cristen Don
Swell Consulting (Newport, OR)

NON-VOTING MEMBERS



Representative David Gomberg (Central Oregon Coast)



Senator Dick Anderson (Lincoln City, OR)

STAFF



Lisa A. DeBruyckere
Director of Strategic Initiatives and Programs (Salem, OR)



Advancing Ocean and Coastal Science in Oregon

About The Trust

Established by the Oregon State Legislature in 2013, the Oregon Ocean Science Trust (OOST) secures and distributes funding to promote ocean and coastal knowledge, research, and monitoring to ensure the sustainable use of Oregon's resources, enhance coastal resilience, and support long-term ocean health for all Oregonians. The OOST operates at the nexus of physical, biological, and social and economic research, bringing the three together to holistically synthesize data and knowledge of our ocean and coastal resources.

Our Priorities

To date, the OOST has furthered important work to assess marine reserves, study ocean acidification and hypoxia, and collect information about Oregon's important nearshore resources. In 2023, the OOST hosted a summit that convened leading thinkers in ocean and coastal policy, management, and research to assess priorities and opportunities for the coming years. Based on this summit, the OOST has identified three key priorities:



Improve our understanding of changing ecosystem and species conditions.

Characterize shifts in ecosystem structure and function, species life history, and biodiversity hotspots.



Enhance social well-being and resilience of ocean and coastal communities.

Better understand the relationship between community well-being and coastal economy, including historic, current, and future ocean and coastal uses.



Operate the OOST with the highest standards of accountability, seeking long-term sustainable funding and capacity to achieve our mission.

Conduct the work of the OOST in a fiscally-responsible manner, emphasizing actionable and transdisciplinary science and knowledge that informs ocean and coastal policy and management issues.



Identify Priority Research Needs

Identify the highest priority ocean and coastal research needs in Oregon while enhancing the state's capacity to deliver on these priorities by facilitating collaboration among scientists and investigators and their respective organizations.

Key progress includes:

- Conducted an inventory to inform understanding of both synergies and gaps relative to Oregon's ocean and coastal research needs.
- Convened a summit of more than 50 Oregon ocean and coastal researchers and policy makers in 2023 to identify the highest priority ocean and nearshore research priorities and key science questions for Oregon.

Support Priority Ocean and Coastal Research

From 2022-2023, the Trust disbursed almost \$2 million in competitive grants for ocean acidification and hypoxia (OAH) as well as nearshore ocean and coastal research while taking steps to diversify the Trust's funding portfolio.

OAH projects funded by the Trust:

- \$385,088 – Intertidal and subtidal OAH monitoring at Oregon's marine reserves to improve understanding of the risk and persistence of OAH while sustaining decadal time-series observations at Cape Perpetua.
- \$97,497 – OAH monitoring at Yaquina Bay, Oregon to collect climate data to share real-time and via a public exhibit at the Hatfield Marine Science Center.
- \$131,126 – Ecosystem modeling of submerged aquatic vegetation to understand the dynamics of pH, dissolved oxygen, and eelgrass in Coos Bay.
- \$170,521 – Develop recommendations for maximizing the abundance of wild and cultured shellfish and submerged aquatic vegetation in Oregon's estuaries and develop best management practices to cultivate shellfish while supporting estuarine health.
- \$174,989 – Assess the life cycle impacts of OAH on shellfish species important to Oregon.
- \$63,376 – Develop a strategy to communicate with the public about OAH impacts, science, and solutions.

Nearshore ocean and coastal research projects funded by the Trust:

- \$181,000 – High-resolution seafloor mapping of nearshore habitats of the Rogue River Reef Complex, which supports the largest remaining kelp beds in Oregon.
- \$193,341 – Monitoring kelp communities in transition along the Oregon coast to address how the ecological characteristics of rocky reef habitats differ.
- \$169,815 – Quantifying juvenile dynamics of important fishes along Oregon's nearshore to characterize important recruitment habitat and inform stock assessments.
- \$190,422 – Assess the impacts of climate change on rocky shore macrophyte assemblages to inform whether climate warming may lead to chronic or sudden changes in abundance and reproduction.
- \$150,000 – Conduct trophic modeling of Oregon's nearshore reefs to forecast the consequences of management activities along Oregon's coast.
- \$10,000 – Assess nearshore data management, portals, and hubs to identify the most scientifically sound and effective approach for enhancing data access, storage, dissemination, and archival for Oregon nearshore ocean data.

Seek Sustainable Funding and Diversify the Funding Portfolio

Continued to advance legislation in the Oregon Legislature to support long-term, state-based funding for ocean and coastal science. While funding was not secured this session, we built critical momentum, deepened legislative engagement, and clarified a pathway for future investment.

The Trust collaborated with the California Ocean Science Trust to launch the West Coast Ocean Science Action Agenda (see "A Peek at the Next Two Years" section of this report) to build a robust and diversified funding portfolio.



A Peek at the Next Two Years

Deliver the West Coast Ocean Science Action Agenda

The primary focus of the Trust in 2025 and 2026 is to work with the California Ocean Science Trust and partners in Washington to deliver the West Coast Ocean Science Action Agenda, mobilizing support for the aligned public-private investments in infrastructure, technology, and workforce development that is necessary to deliver on those priorities. To develop the agenda, we will seek input from coastal communities, scientists, academic leaders, and legislators, who care deeply about supporting a healthy, resilient, and productive ocean through science-based management and policy. Through a series of high-level convenings, a coastwide action agenda will be developed that describes shared priority ocean and coastal science needs. Enhanced funding to the region will put science to work to accelerate progress toward a vision of a healthy, equitable, and productive ocean future.

In 2024, the Trusts launched the agenda, created a website (<https://www.oceanscienceagenda.org/>), and conducted outreach to inform federal, state, and local governments, coastal Tribes, academics, policy makers, and others about the importance of the initiative and its aim to address the most compelling ocean and coastal issues facing our generation. Key next steps include creating an advisory committee for the initiative (July 2025), then working with coastal entities to plan for subregional convenings in locations along the West Coast (2025-2026). Shared priorities will be compiled, and an implementation plan developed to identify potential sources of funding to support the needed research (late 2026).

Expand the Size of the Trust Board

Additional Board capacity will enhance the ability of the Trust to operate and expand as well as add fundraising and other capacity.

Seek Capacity Building and Other Grants to Build a Diversified Funding Portfolio

Efforts will be made to solicit federal and state, private, and other funds to develop a sustainable, long-term funding portfolio.

Partners Make a Difference

Our partnerships enable us to have a greater impact and work in coordination on ocean and coastal science across the state and region. Thank you to:



**Oregon Department
of Fish & Wildlife**



Funders and Donors

The following entities and individuals have contributed in-kind and financial support to the Oregon Ocean Science Trust during the past two years. Thank you to:

- Builders Initiative
- Charles Scott Baker
- Laura Anderson
- Lisa DeBruyckere
- Oregon Ocean Conservation Fund
- Oregon Coast Visitors Association
- Oregon Department of State Lands
- Pew Charitable Trusts
- Surfrider Foundation
- The Nature Conservancy
- Theodore DeWitt
- William Chadwick



How You Can Support the Trust

The more we know about the ocean, the more we appreciate its impact on our lives.

Each of us has a special place along the Oregon coast – a favorite beach to take a stroll, a coastal campground to make annual memories with family, a choice local seafood restaurant, a place to catch the sunset, or watch the ocean during winter storm surge events. Regardless of the location, Oregonians love our coast and ocean.

The Oregon Ocean Science Trust works to strengthen the knowledge of this special place by providing grants that go directly to scientists who further our understanding of the species and habitats that make the Oregon coast unique.

The Trust is one of only two national ocean science trusts dedicated to investing in coastal and ocean science and monitoring to help us better understand our marine life and habitats and the threats these important resources face.

During the last three years and with the support of the Oregon Legislature, the Trust has invested almost \$2 million to support science and monitoring projects that monitor changes in ocean chemistry and learn how marine life responds to low oxygen conditions (<https://www.oregonoceanscience.com/funded-research-projects-oah>), assess the health and abundance of Oregon's nearshore species and habitats (<https://www.oregonoceanscience.com/nearshorereseach>), and inform ways to reduce the effects of human activities on those species and habitats.

The Oregon Community Foundation accepts donations on behalf of the Trust. If you would like to make a donation to directly support ocean and coastal science in Oregon and enable the Trust to continue to serve Oregon's coast and ocean, you can make a tax-deductible charitable contribution to:

Oregon Ocean Science Trust Fund (Fund ID 431308)

Oregon Community Foundation
530 Center Street NE, Suite 230
Salem, OR 97301



DONATE ONLINE

You may also donate online by using the QR code or visiting this link: <https://bit.ly/4n9gyYf>

FOR MORE INFORMATION

To learn more about the OOST and sign up to receive updates on funding opportunities:

- Visit OregonOceanScience.com
- Email OOST@OregonOceanScience.com
- Follow us @OceanSciOR on LinkedIn and Instagram



About the trust

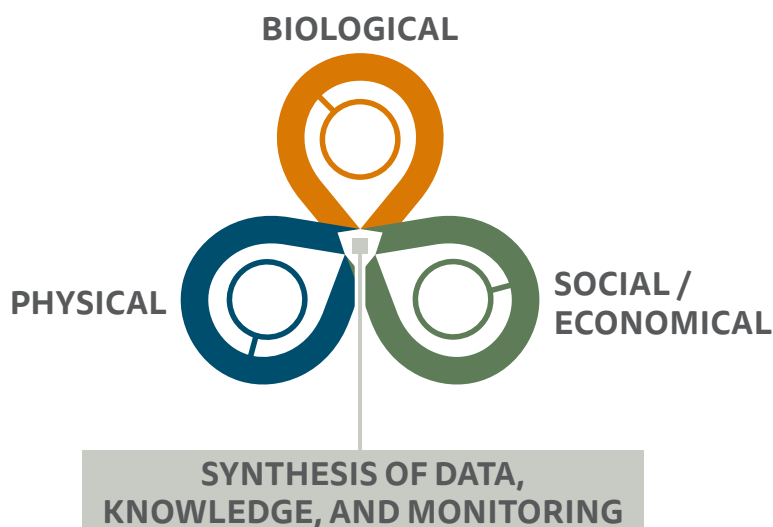
Established by the Oregon State Legislature in 2013, the Oregon Ocean Science Trust (OOST) secures and distributes funding to promote ocean and coastal knowledge, research, and monitoring to ensure the sustainable use of Oregon's resources, enhance coastal resilience, and support long-term ocean health for all Oregonians. The OOST operates at the nexus of physical, biological, and social and economic research, bringing the three together to holistically synthesize data and knowledge of our ocean and coastal resources.

Where we add value

The Oregon Ocean Science Trust:

- Secures resources to support and fund ocean and coastal science monitoring specific to the needs of Oregon
- Leverages resources through partnerships
- Is nimble, responsible, and cost-effective, and not limited to biennial budget cycles
- Works to build a base of public support

TYPES OF RESEARCH WE SUPPORT



Our priorities

To date, the OOST has furthered important work to assess marine reserves, study ocean acidification and hypoxia, and collect information about Oregon's important nearshore resources. In 2023, the OOST hosted a summit that convened leading thinkers in ocean and coastal policy, management, and research to assess priorities and opportunities for the coming years. Based on this summit, the OOST has identified three key priorities:



Improve our understanding of changing ecosystem and species conditions.

Characterize shifts in ecosystem structure and function, species life history, and biodiversity hotspots.



Enhance social well-being and resilience of ocean and coastal communities.

Better understand the relationship between community well-being and coastal economy, including historic, current, and future ocean and coastal uses.



Operate the OOST with the highest standards of accountability, seeking long-term sustainable funding and capacity to achieve our mission.

Conduct the work of the OOST in a fiscally-responsible manner, emphasizing actionable and transdisciplinary science and knowledge that informs ocean and coastal policy and management issues.

Achieving our priorities

In the near term, the OOST aims to support science and monitoring that informs policy and management for three key issues:

- ① Carbon and climate impacts to ocean conditions
- ② Sustainable food production and fisheries
- ③ Coastal and ocean development and infrastructure



Our vision is to support science and monitoring projects



Climate: Identify the most appropriate and actionable climate solutions to protect, restore, and manage nearshore habitats as well as sequester carbon, improve coastal resiliency, and enhance adaptations to coastal hazards and sea level rise.

Priorities this supports: ○○○



Knowledge and data gaps: Identify and fill knowledge and data gaps, improve accessibility, and synthesize existing data. Explore development of new tools, such as AI. Support knowledge co-production.

Priorities this supports: ○○○



Energy: Build understanding of emerging ocean infrastructure and its effects on ecosystems and people.

Priorities this supports: ○○



Species and habitat: Build and enhance capacity for long-term monitoring to develop indicators for resilience. Understand changes in species distribution and abundance with changing ocean conditions.

Priorities this supports: ○○



Fisheries: Understanding the sustainability of populations of key species in the face of changing ocean conditions and high fishery demand.

Priorities this supports: ① ②

FOR MORE INFORMATION

To learn more about the OOST and sign up to receive updates on funding opportunities:

- Visit OregonOceanScience.com
- Email OOST@OregonOceanScience.com
- Follow us @OceanSciOR on LinkedIn and Instagram





Oregon

Tina Kotek, Governor

Department of State Lands

South Slough National Estuarine Research Reserve
P.O. Box 5417 | 61907 Seven Devils Road
Charleston, Oregon 97420
(541) 888-5558
FAX (541) 888-5559
www.oregon.gov/dsl/ss
State Land Board

M E M O R A N D U M

Tina Kotek
Governor

Tobias Read
Secretary of State

Elizabeth Steiner
State Treasurer

Date: October 14, 2025

To: Governor Tina Kotek
Secretary of State Tobias Read
State Treasurer Elizabeth Steiner

From: Kaitlin Lovell
Director

Subject: Annual Report of the South Slough National Estuarine Research Reserve (Item 5)

The Oregon Department of State Lands oversees the South Slough National Estuarine Research Reserve on the Southern Oregon coast and reports annually on management and performance of the Reserve. The Reserve manages nearly 7,000 acres of natural habitat which include open water channels, tidal and freshwater wetlands, riparian areas, and forested lands.

The South Slough Reserve Annual Report for January 1 to December 31, 2024, highlights key activities and priorities, including operational and management updates, progress on the Wasson Creek restoration project; efforts to manage the invasive five-spine green crab; and our continued commitment to engaging community through research, stewardship, and education opportunities at the Reserve.

The report provides current information about the Reserve's programs, including how they address the coastal management and education needs of Oregonians. It can be compared to prior years to track progress and to identify areas where adjustments may be needed.

APPENDICES

A. Annual Report for the South Slough Reserve, 2024



Annual Report of the South Slough Reserve

Calendar Year 2024

OREGON DEPARTMENT OF STATE LANDS

MEET THE PROGRAM



3 Meet The Program

4 Program Services

5 Calendar Year In Numbers

6 Takeaways From This Report

- Wasson Creek Restoration Project: Phase I
- Managing Invasive Green Crab
- Resonating with the Community

10 Strategic Plan Check-In

11 The Future

14 Appendix A: Reserve Partners

LauraBeth Barton, a citizen of the Coquille Indian Tribe, at the opening ceremony for the Wasson Creek Restoration Project.

Storytelling by LauraBeth from the ceremony can be **viewed here on YouTube**.

At the time, LauraBeth was a representative on Tribal Council and serves on South Slough Reserve Management Commission.

MEET THE PROGRAM



The first of 30 National Estuarine Research Reserves around the nation, South Slough Reserve is a leader in improving understanding of estuaries and coastal watersheds. The Reserve manages and studies nearly 7,000 acres of natural area, including open water channels, tidal and freshwater wetlands, riparian areas, and forested lands.

Reserve lands and waters are used by visiting researchers, teachers and students, and other members of the public who come to the Reserve to hike or paddle, view wildlife, and participate in community classes. The Reserve Visitor Center offers interpretive exhibits as well as meeting spaces for the public.

The Reserve is located on state-owned land in the Coos estuary on Oregon's southern coast. Management is in partnership with Oregon Department of State Lands and National Oceanic and Atmospheric Administration. Co-stewardship of the land is in partnership with three local sovereign Tribal Nations:

- Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians
- Coquille Indian Tribe
- Confederated Tribes of Siletz Indians

This Annual Report of the South Slough Reserve for calendar year 2024 highlights critical environmental research, restoration, and community access.

PROGRAMS SERVICES AT THE RESERVE

APPENDIX A

COASTAL TRAINING

We provide training and technical assistance to decision-makers in coastal management and science fields.

[More information](#)

OUTREACH PROGRAMMING

We offer an array of programs for all ages to engage with estuary science, from mushroom identification to learning how to crab.

[More information](#)

CONDUCTING/FACILITATING RESEARCH

Staff conduct various research and monitoring efforts. The estuary is analyzed for local, regional, and national trends. They also mentor and facilitate visiting researchers.

[More information](#)

INTERNSHIPS

We host educational internships for high school and college students to provide opportunities for future scientists and science educators.

[More information](#)

STEWARDSHIP AND CULTURAL RESOURCES

We co-steward the lands and waterways together with three local sovereign Tribal Nations as they cared for these lands since time immemorial.

[More information](#)

PUBLIC RECREATION

The Reserve staff and volunteers maintain over four miles of hiking trails, including boardwalks bordered by skunk cabbage (see report cover), as well as paddle trails.

[More information](#)

EDUCATION OPPORTUNITIES

The Reserve provides education for toddler through high school age as well as Oregon teachers, providing tools to bring hands-on science into their classrooms.

[More information](#)

HABITAT AND SPECIES PROTECTION

We manage nearly 7,000 acres for habitat and species conservation to improve coastal science understanding and ecosystem health.

[More information](#)

CALENDAR YEAR 2024 IN NUMBERS

3,053 PEOPLE

*served by our
Visitor Center with more
enjoying our trails
365 days/year*

56 RESEARCH PROJECTS

*of research were conducted
by staff and visiting
scientists*

1,528 STUDENTS

*in Oregon K-12 participated
in field trips or
in-school learning*

214 DECISION MAKERS

*trained in workshops
to better inform their
understanding of coastal
data and ecology*

164 PROGRAMS

*for public education,
from interpretive classes to
science summer camp*

67 VOLUNTEERS

*removed invasive species
alongside staff and partners
during Saturday Stewards
events*

Education Coordinator Jaime Belanger demonstrating how to monitor salt in estuary waters with Seasonal Education Specialist Cherie Turner.

TAKEAWAYS FROM THIS REPORT

WASSON CREEK PHASE I

After receiving over \$3.5M from the Bipartisan Infrastructure Law, the Wasson Creek Restoration Project broke ground in 2024.

RESONATING WITH COMMUNITY

South Slough celebrated 50 years as the first National Estuarine Research Reserve in the nation by **connecting with community**.

MANAGING INVASIVE GREEN CRAB

The Reserve is researching the invasive 5-spine green crab (aka European green crab), a voracious predator that disrupts marine ecosystems and is now found in Oregon estuaries.

WASSON CREEK PHASE I

After receiving over \$3.5M from the Bipartisan Infrastructure Law, the Wasson Creek Restoration Project broke ground in 2024 with earth moving and native planting efforts. The valley floor was re-graded, which removed invasive species, returned stream flow, and created valley elevations for native wetland habitat.

The Reserve was grateful to work with local sovereign Tribal Nations cultural resource monitors to navigate inadvertent discoveries on the project.

525

*acres included
in the restoration*

9,897

*fish and amphibians
relocated*

7,900+

native species planted

\$250,000

*contributed to
the local economy*



CHALLENGE

The location of the Wasson valley poised a challenge for hiring contractors capable of working on such a remote job site. In addition, contractors had to factor in security concerns due to a history of equipment vandalization on-site.

Another challenge has been ensuring accessibility. It's important for people of different mobilities to experience the estuary, but the steep forested terrain and ever-changing wetlands are obstacles. How can we help people reach the estuary edge?

NEXT STEPS

A new project manager for the Reserve, Juliana Ruble, is assisting with the Wasson Creek Restoration Project.

To make the estuary accessible, a boardwalk is being designed with consideration to sedimentation rates, sea level rise, and earthquake vulnerability. Work on the boardwalk is anticipated to be completed by Winter 2025/6.

Contractors will also be on-site Summer 2025 to execute the project's forestry health plan to protect old stands, help young trees prosper, and improve resilience against severe wildfires.

In addition to broader work, Stewardship Coordinator Dr. Alice Yeates, continues to ensure ongoing co-stewardship with local sovereign Tribal Nations throughout the process.



*Pulling Together:
Coordinated effort by
paddlers towards a
shared goal.*

Reps from federal, state, and local sovereign Tribal Nations receive etched paddles at the opening ceremony for the Wasson Creek Restoration Project.

MANAGING INVASIVE GREEN CRAB

The Reserve is researching the 5-spine invasive green crab (aka European green crab), a voracious predator that disrupts local marine ecosystems and is now found in Oregon estuaries.

This species is detrimental to economically important species such as Dungeness crabs and shellfish, including oysters. Green crabs also destroy eelgrass beds which are important nursery habitat for numerous fish species.

22 YEARS

of data studying crab abundance in Coos Bay

221 TRAPS

set at 11 sites to capture green crabs

35 CRABS

allowed for recreational take by ODFW

1,506

green crabs captured from all sites

CHALLENGE

After tracking other approaches, Reserve staff determined *management* rather than *eradication* was more practical for protecting the estuary from the negative impacts of green crab. There are studies quantifying the destruction of fishing industries by invasive green crab on the East Coast, but little advanced understanding of green crab in Oregon.

Harvesting of green crab currently lacks a business case. No commercial take is currently allowed, due to misidentification as well as lack of market demand. Color being unreliable, the most useful identification trait are the 5-spines on either side of the eyes.

NEXT STEPS

Reserve staff will continue to work on building a business case for market demand and work with local businesses to understand the species' impact on oyster aquaculture.

The Reserve is partnering with Southwestern Oregon Community College to purchase a meat extractor to efficiently harvest meat for food and process shells for a beneficial garden amendment. The potential for these two new commercial markets is promising, especially since blind taste tests prefer green crabs over Dungeness.

South Slough's Margaret A. Davidson fellow, Lizzie Diel, is researching what green crabs eat by analyzing fatty acid profiles to understand how green crabs impact native clams, Pacific oysters, and Dungeness crabs in the South Slough and Coos Bay estuary. Research by Lizzie Diel will assist in making the case for increasing green crab harvest limits.

“ We grow most of our oysters in Joe Ney Slough and some in South Slough. There are hundreds of thousands of them [green crabs] up there. They are a really big problem for us. They get in and they eat the oysters. We watch the numbers just spike, and spike, and spike. ”

- Gavin Augustin, owner Qualman Oysters Farms

RESONATING WITH COMMUNITY

South Slough celebrated 50 years as the first National Estuarine Research Reserve (NERRS) in the nation by connecting with community.

From showcasing our new exhibits at the Visitor Center to partnering with Tillamook Estuary Partnership and Sea Grant in providing teacher training, the Reserve worked with partners throughout the Oregon Coast to increase access to science programming.

33 TEACHERS

*from K-12 schools
throughout Oregon
trained*

3,053 PEOPLE

*served at the
Visitor Center*

\$275,502

*in grants from NOAA
for new exhibits*

700 SQFT

*of exhibit hall
renovated at the
Visitor Center*

164

*public education
programs*

CHALLENGE

The Reserve works to resonate with many different types of people. Providing Oregon schoolteachers with the tools to teach biodiversity and climate resiliency in their classrooms. Helping shellfish harvesters understand the impact of climate change on estuary systems. Getting the word out to Spanish-speaking parents that the Reserve has summer science camps.

There are three known challenges the Reserve faces in resonating with the community:

1. Remote physical location of the Reserve in a rural area
2. Capacity required for highly collaborative projects
3. Translation of complex information for disparate audiences

NEXT STEPS

The Reserve is working to make the physical site as well as programming more accessible, which will aid in resonating with the community.

New exhibits in the Visitor Center, completed in June 2025, will integrate Miluk Coos heritage and science learning with plain language as well as hands-on, interactive components. A new front entrance project, anticipated to be complete by Summer 2026, will make it possible for more school children to visit the Reserve as buses will have increased access.



The State Land Board joins federal partners and local sovereign Tribal Nations to cut the ribbon on new exhibits at the Visitor Center in August 2024.

STRATEGIC PLAN CHECK-IN

The South Slough Reserve has been working towards completion of **Strategic Plan** projects.

Some examples of measurable objectives tracked by the plan include:

- Creating in-class learning activities and hands-on field trip experiences to teach students about estuarine and coastal systems.
- Improve forest health and reduce wildfire risk on DSL-managed and surrounding forest lands.
- Provide professional development opportunities for teachers

8

number of program projects

10%

program percent of total Strategic Plan projects

100%

percent of projects continuous

THE FUTURE

A group of children are standing outdoors in a wooded area. In the foreground, a boy in a black jacket is looking down at a green booklet he is holding. Behind him, a girl with long brown hair is also looking at a similar booklet. To the left, another child is partially visible, wearing a black cap and a grey hoodie. The background is filled with green foliage and trees.

Currently, the National Oceanic and Atmospheric Administration provides roughly 50% of Reserve operating costs with approximately 90% of that funding dedicated to personnel.

As we navigate through the current uncertainty of funding from our federal partner, we are struggling to understand the impacts to continued scientific studies, education, and outreach.


What will happen if we have to stop 30-year-old water quality monitoring?

Will a generation of school children miss the opportunity to learn hands-on science about the ecosystem in their own backyard?

How will the local fishery industry respond to invasive species without this critical data?

And how will coastal decision makers make informed choices about the future without data?

These are the questions that we will be facing in the future.



Looking towards the future, the Reserve has identified three actions to enhance accessibility to the Reserve and continue landmark restoration of the Wasson Valley.

Local contractor Rogue Detection works in the Wasson Valley of the Reserve to find animal scat. The material is analyzed by Oregon State University genetics lab to help the restoration scientists understand what wildlife are using the site pre-restoration.

1

FRONT ENTRANCE PROJECT

Scheduled for completion by 2026, work will be underway in 2025 for a new Reserve entrance which will provide better access for school buses, more visitor parking, reliable internet to the Visitor Center, and safer routes for drivers and pedestrians.

2

WASSON LOOP TRAIL AND BOARDWALK

The trail is anticipated to be completed by Winter 2025/26 and utilizes best practices in accessibility (relatively smooth surfaces, gentle slopes, and wider paths) to allow visitors of different mobility levels the opportunity to experience the estuary edge.

3

WASSON CREEK - PHASE II

Increasing forest health, planting native species, building stream complexity, and collaborating with local sovereign Tribal Nations and other local partners are slated for 2025 in the valley.

Tribal Partners

- Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians
- Coquille Indian Tribe
- Confederated Tribes of Siletz Indians

Local Businesses

- 7 Devils Brewing Company
- Blue Ridge Timber Cutting INC.
- Coos Head Food Coop
- Habitat Contracting LLC
- HGE Architects
- John Goodwin
- BiCoastal Media KWRO
- PAC Creative Agency LLC
- Swanson Ecological
- West Coast Purple Martin Wildlife
- Wilson Biochar

City and County Partners

- Coos Forest Protective Association
- Coos Basin Coho Partnership
- Coos Bay Planning Department
- Coos County Commissioners
- Coos County Forestry Department
- Coos County Planning Department
- Coos County Roads Department
- North Bend Planning Department
- Oregon International Port of Coos Bay
- Rogue Valley Council of Government
- Coos Bay Downtown Association

State Partners

- Oregon Department of State Lands
- Oregon Department of Fish and Wildlife
- Oregon Department of Land Conservation and Development
- Oregon Department of Forestry

- Oregon Department of Transportation
- Oregon Coast STEM Hub
- Oregon Sea Grant
- Oregon Department of Agriculture
- Oregon Natural Resources Education Program
- Oregon Parks and Recreation Department
- Oregon Watershed Enhancement Board
- Washington State Department of Natural Resources

Federal Partners

- National Oceanic and Atmospheric Administration
- National Estuarine Research Reserve System
- U.S. Forest Service
- Bureau of Land Management
- U.S. Fish and Wildlife Service
- U.S. Coast Guard
- U.S. State Department
- U.S. National Parks Service
- Integrated Ocean Observing System
- United Communities AmeriCorps

School and University Partners

- University of Oregon
- Oregon State University
- Portland State University
- Southern Oregon University
- University of California, Davis
- Louisiana State University
- Sacred Heart University, CT
- The College of Idaho
- University of New Hampshire
- University of Washington
- Woods Hole Oceanographic Institution
- Eddyville Charter School
- Marshfield High School
- Hillcrest Elementary School
- North Bay Elementary School
- Bandon High School

Additional Partners

- Friends of South Slough, Inc.
- Oregon Ocean Science Trust
- Partnership for Coastal Watersheds
- Coos Watershed Association
- Wetlands Conservancy
- The PEW Charitable Trusts
- Tenmile Lakes Basin Partnership
- Wild Rivers Land Trust
- Pacific Marine and Estuarine Fish Habitat Partnership
- Trailkeepers of Oregon
- National Science Foundation
- Parks Canada
- George Wright Society
- Pacific Lamprey Conservation Initiative
- South Coast Food Co-op
- The Egyptian Theater
- American Fisheries Society
- Tillamook Estuary Partnership
- Bandon Dunes Charitable Foundation
- Bay Area Hospital
- CatBird Stats
- Charleston Food Bank
- Coos Bay Downtown Farmers Market
- Coos Bay Garden Club
- Coos Bay Surfrider
- Coos Head Garden Club
- Coos Hispanic Allies
- Coos Soil and Water Conservation District
- Coquille Watershed Association
- Curry Soil and Water Conservation District
- Drew's Native Plants
- Farm Unlimited LLC
- Friends of Shore Acres
- Institute for Applied Ecology
- Leadership Coos
- League of Women Voters
- Lone Rock Timber
- Ko-Kwel Casino Hotel
- Natural Resources Conservation Service
- NW Watershed Association
- Oregon Museum of Science and Industry
- Pacific Birds Habitat Joint Venture
- PNW Blue Carbon Working group
- Roca Communications
- Rogue Climate
- Rogue Detection Teams LLC
- Smithsonian
- Southwestern Oregon Workforce Investment Board
- The Nature Conservancy
- The Understory Initiative
- Western Invasives Network
- Xerces Society
- Oregon Natural Resources Education Program



Oregon

Tina Kotek, Governor

Department of State Lands

775 Summer Street NE, Suite 100

Salem, OR 97301-1279

(503) 986-5200

FAX (503) 378-4844

www.oregon.gov/dsl

State Land Board

Tina Kotek

Governor

Tobias Read

Secretary of State

Elizabeth Steiner

State Treasurer

M E M O R A N D U M

Date: October 14, 2025

To: Governor Tina Kotek
Secretary of State Tobias Read
State Treasurer Elizabeth Steiner

From: Kaitlin Lovell
Director

Subject: Southern Resident Orca Endangered Species Management Plan (Item 6)

On February 16, 2024, the Oregon Department of Fish and Wildlife Commission (the Commission) listed Southern Resident orcas as endangered under the Oregon Endangered Species Act. The Department of State Lands has responsibilities that contribute to conservation of this species, and is providing the State Land Board with:

- an overview of those responsibilities,
- an update on adoption of the Southern Resident Orca Management Plan (Appendix A), and
- an outline of next steps, including where this work intersects with Land Board oversight.

About Southern Resident Orcas

Southern Resident orcas (also known as killer whales) are a distinct population of orcas native to the eastern North Pacific Ocean. They spend most of their spring through fall in the Salish sea and their winter through early spring along the coasts of Washington, Oregon, and northern California. Oregon's coast is an important migration corridor

between feeding areas to the north and south. The waters near the Columbia River are especially important, providing a key foraging area.

This population of orcas is critically low and estimated at only 74 individuals in three pods. Major threats include:

- declining Chinook salmon - their primary food source,
- marine pollution and contaminants, and
- disturbance from vessel traffic and underwater noise.

Role of the Department of State Lands

Due to the Department's role in managing lands and waterways, the Commission directed the Department to develop an endangered species management plan within 18 months of the February 2024 decision. The Department's Southern Resident Orca Management Plan was approved by Interim Director Bill Ryan on July 10, 2025 and adopted by the Commission on August 15, 2025. The plan outlines how the Department's ownership and regulatory responsibilities will contribute to conservation efforts.

Easement Authorizations in Oregon-Owned Waterways

The Department manages Oregon-owned navigable-for-title waterways, including the territorial sea, by issuing leases, easements, and other authorizations for private and commercial uses. Easements within the territorial sea require Land Board approval, and conditions on the authorization may include conservation measures to reduce risks to the Southern Resident orcas. Examples include:

- Requiring an evaluation of the project's potential effects on orca,
- Requiring construction timing that avoids peak orca migration periods, and
- Requiring decommissioning of seafloor infrastructure at the end of its lifecycle and recovery of the area.

Removal-Fill Permits

The Department also protects wetlands and waters by requiring permits for most projects that add, remove, or move more than 50 cubic yards of material. A permit is required for any amount of material in essential salmonid habitat, including where Chinook salmon spawn and rear. Removal-Fill permits often include conservation measures that limit disturbance to these salmon and their habitats, such as minimizing soil movement during construction and improving habitat as compensatory mitigation for any project impacts.

Next Steps: Rulemaking for Easements in Oregon's Territorial Sea

On June 10, 2025, the Land Board initiated rulemaking in OAR 141-083 to update administrative rules for undersea cable easements. The purpose is to strengthen protections for marine ecosystems while ensuring that the public receives fair

compensation for seafloor usage. The proposed changes will also reflect conservation measures for Southern Resident orcas as defined in the recently adopted plan.

The revised rules will also establish a more effective cooperative framework among applicants, state and federal agencies, Tribal governments, and local communities. Many of these entities also share responsibilities and interests in these conservation efforts.

A rulemaking advisory committee will begin work in December 2025. Following input from the committee, public comments, and consultation with agencies, Tribes, and affected parties, the Department anticipates presenting draft rules to the Land Board for adoption in 2026.

Appendices

- A. Oregon Department of State Lands Southern Resident Orca Management Plan
(August 15, 2025)

Oregon Department of State Lands

SOUTHERN RESIDENT ORCA MANAGEMENT PLAN



Requested by the Oregon Fish and Wildlife Commission
under the Oregon Endangered Species Act

Prepared by:
Dr. Nataliya Stranadko
Planning & Policy Unit



2025

TABLE OF CONTENTS

EXECUTIVE SUMMARY.....	3
Introduction.....	4
Background	5
Southern Resident Orca Biology and Habitat	5
Population Status	7
Key Threats to Southern Resident Orcas	9
International Protective Measures.....	12
Federal Protective Measures.....	12
State Protective Measures	12
ODSL Role in Conservation of Southern Resident Orcas.....	13
ODSL Mission, Statutory Obligations and Policies	13
State Land Covered by the Plan and the Agency Role	14
Agency Proprietary Practice	16
Agency Non-Proprietary (Removal-Fill) Practice.....	18
Adaptive Management Strategy	22
ODSL Process for Plan Development and Approval.....	22
Monitoring, Evaluation, and Review	22
ODSL Coordination with the Other Agencies and Efforts	22
References	23

EXECUTIVE SUMMARY

The Southern Resident Orcas (SROs, *Orcinus orca ater*) are a distinct population of orcas (killer whales) with 73 individuals remaining in 2024, compared to 98 in 1995, in the eastern North Pacific Ocean. Prey availability, sound and vessel disturbance, environmental contaminants, and oil spills are the primary threats to SROs that impact their biological conditions, lifespan, survival, and recovery.

In 2001, the United Nations Convention on the Conservation of Migratory Species of Wild Animals required international cooperation and agreements for the conservation and management of killer whales. In 2003, the National Marine Fisheries Service designated the SROs as depleted under the Marine Mammal Protection Act, and in 2005, they were listed as endangered under the U.S. Endangered Species Act.

In 2024, the Oregon Fish and Wildlife Commission listed SROs as endangered under the Oregon Endangered Species Act, requiring state land-owning or managing agencies to define their role in the conservation of SROs and develop an Endangered Species Management Plan (ESMP).

Considering the statutory requirements and policies, and the role of the agency's lands through overseeing the Oregon waters and seabed extending three geographical miles seaward from the coastline of the Pacific Ocean, the Oregon Department of State Lands defines the role its lands play in SROs' conservation as "contributing to conservation."

This ESMP includes the following proprietary (ownership) and non-proprietary (regulatory) actions that the agency is currently taking or planning to implement to contribute to SROs' conservation:

- Including SRO requirements in the proprietary authorization process for anyone who wants to develop a project and place renewable energy facilities and undersea infrastructure (e.g., cables, pipelines, and other utilities) in the territorial sea.
- Including SRO requirements in the removal-fill permit application process for project activity that moves materials in water, such as grading or dredging, in submersible and submerged lands within the territorial sea.
- Providing necessary information and requirements about SROs during the Joint Agency Review Team meetings under the Oregon Territorial Sea Plan Parts 4 and 5.

Introduction

On February 16, 2024, the Oregon Fish and Wildlife Commission (the Commission) voted to amend OAR 635-100-0125, listing the Southern Resident Orca (SRO) as an endangered species under the Oregon Endangered Species Act. At the time of listing, the Commission also adopted survival guidelines for the species (OAR 635-100-0138), as required by statute. These rule changes affect decisions made on state-owned or managed lands, including leased lands or those where the state holds a recorded easement, as well as state waters.

In June 2024, the Commission determined that the Oregon Department of State Lands (ODSL) is an agency that owns and manages state lands where SROs or their habitat are found and that ODSL can play a role in SRO conservation.

In March 2025, the Commission determined that ODSL is also a non-land-owning or managing agency that can contribute to SROs' conservation.

This Southern Resident Orca Endangered Species Management Plan (ESMP) is prepared at the request of the Oregon Fish and Wildlife Commission and covers both ODSL proprietary (ownership) and non-proprietary (removal-fill) roles in the conservation of SROs.

This ESMP begins by introducing basic information about the Southern Resident Orcas, including their biology, habitat, and population status. Then, it highlights the key threats to these endangered species, as well as current international, federal, and state policies and protective measures in place. Moving forward, the ESMP emphasizes the ODSL's role in SRO conservation and proprietary and removal-fill practices to meet this role.

The ESMP concludes with the Adaptive Management Strategy that the agency uses for the development and implementation of this Plan, highlighting monitoring, evaluation, review, and coordination as essential components for achieving conservation goals.

For more information about the SRO ESMP, please contact:

Dana Hicks
Planning & Policy Manager
Dana.Hicks@dsl.oregon.gov

Charles Redon
Removal-Fill Specialist
Charles.Redon@dsl.oregon.gov

or

Dr. Nataliya Stranadko
Territorial Sea Specialist
Nataliya.Stranadko@dsl.oregon.gov

Blake Helm
Proprietary Specialist
Blake.Helm@dsl.oregon.gov

Background

Southern Resident Orca Biology and Habitat

The Southern Resident Orcas (SROs, *Orcinus orca ater*) are a distinct population of orcas (killer whales) native to the eastern North Pacific Ocean with a range that extends from southeastern Alaska to central California (Figure 1).

SROs spend much of the late spring, summer, and fall in the inland marine waters of Washington State and southern British Columbia, collectively referred to as the Salish Sea, which includes Puget Sound, the Strait of Juan de Fuca, and the Strait of Georgia. During the winter and early spring, SROs spend a considerable amount of time off the coasts of Washington, Oregon, and northern California (ODFW, 2024).



Figure 1. Distribution location of Southern Resident Orcas (OCEANA)

Orcas, also known as killer whales, are the largest members of the dolphin family and apex marine predators. The name “killer whale” originates from early whalers and is appropriately based on the species’ predatory habits, as well as its large size, which distinguishes them from other dolphins (NMFS, 2008).

Killer whales are easily identifiable by their distinctive black-and-white color pattern, and differences in the appearance of their dorsal fins and saddle patches are unique to individual orcas, allowing them to be identified visually during annual censuses (Figure 2).



Figure 2. Orcas' black-and-white appearance (Center for Whale Research; Photo by Mark Malleson)

Adult males can attain a length of 9.0 m (29.5 ft) and a weight up to 5,568 kg (12,275 lb), while females may reach a length of 7.7 m (25.3 ft) and a weight of 3,810 kg (8,400 lb). The average life expectancy of Southern Resident orcas is 29 years for females and 17 years for males, with maximum life spans of 80–90 years and 60–70 years, respectively (ODFW, 2024).

Among the three ecotypes of orcas (Figure 3), SROs are one of the four distinct populations of resident orcas, who rely almost entirely on fish for their diet, particularly Pacific Salmon (NMFS 2008; NMFS, 2021a; NMFS, 2021b; ODFW, 2024).

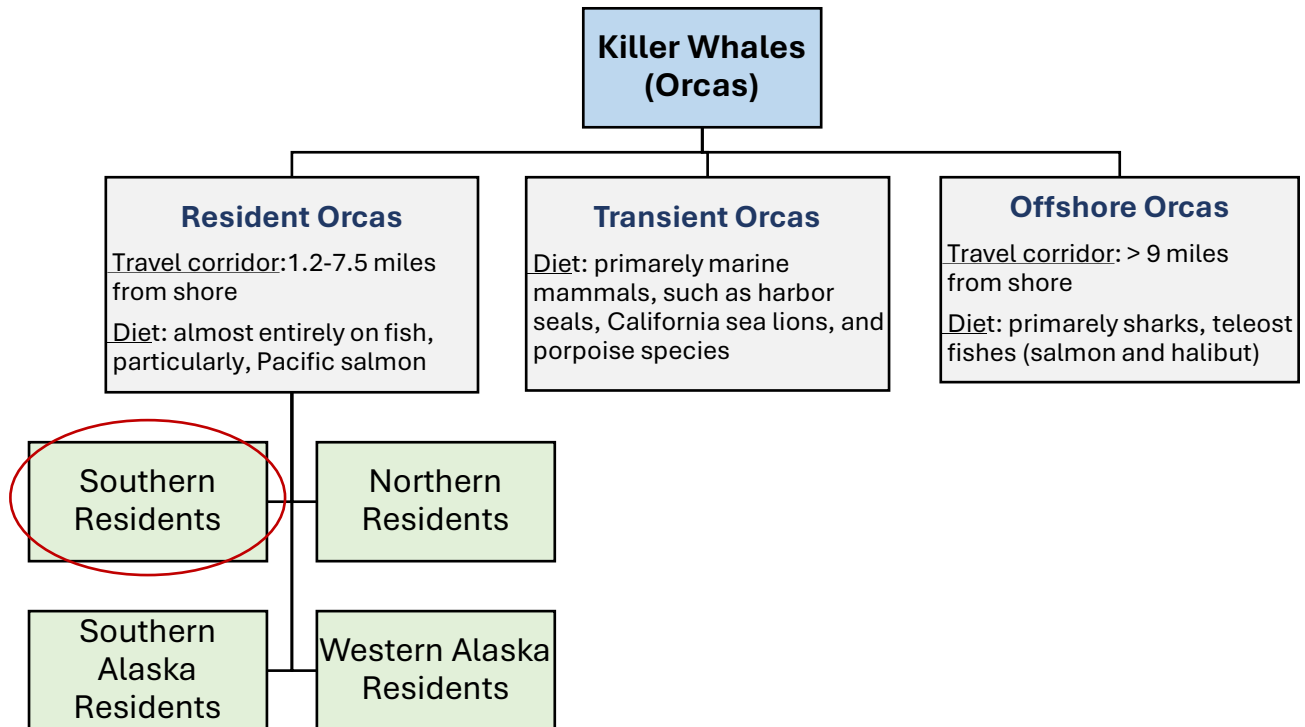


Figure 3. Classification of orcas: ecotypes and populations

Population Status

SROs are highly social animals with a stable and hierarchical family group based on maternal descent. Their social structure consists of several female-led matriline, organized into three pods designated as J, K, and L.

The SROs community may have numbered more than 200 individuals until the mid-to-late 1800s (Krahn et al., 2002; ODFW, 2024), when Euro-American settlement began to impact the region's natural resources. Scientists estimate the minimum historical population size of Southern Residents in the eastern North Pacific was about 140 animals (NOAA, 2025).

During the late 1960s and early 1970s, the capture of SROs for aquaria and marine parks had an immediate negative impact on the population, resulting in a 30% decline in its members between 1967 and 1971 (Figure 4).

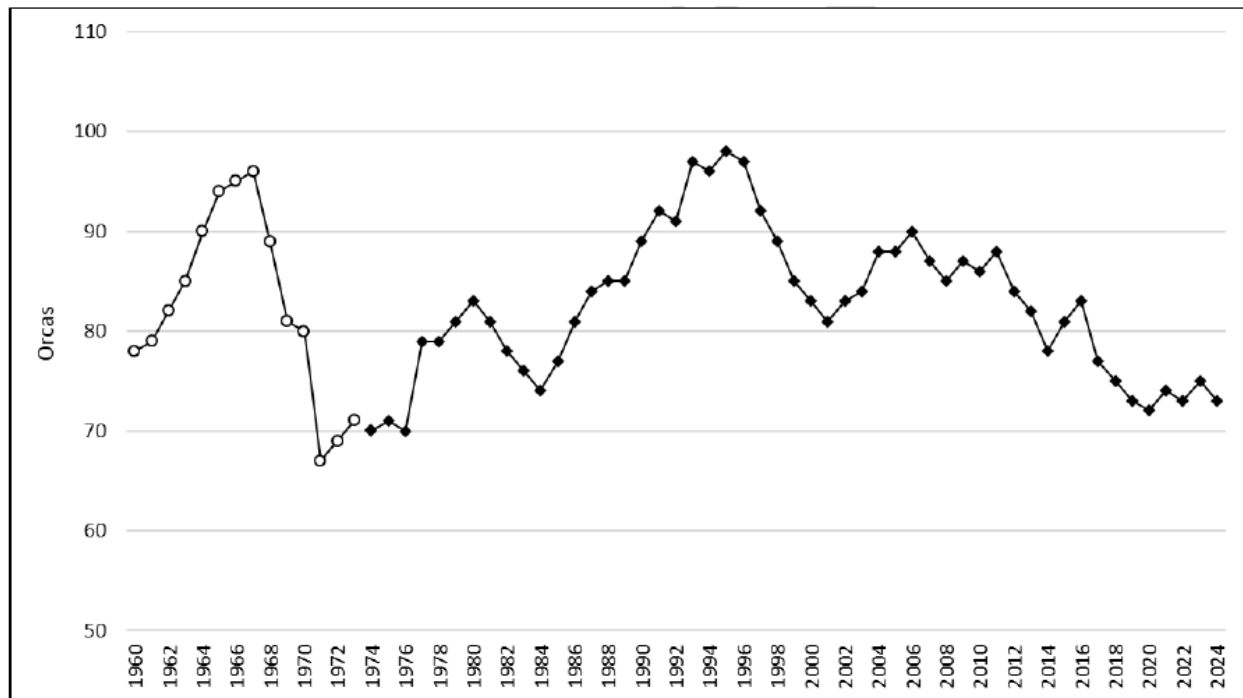


Figure 4. Population size and trend of Southern Resident orcas, 1960–2024 (ODFW, 2025)

Collections for aquaria decreased dramatically after 1971 due to public opposition. Although this allowed the SROs population to gradually rebuild, reaching a peak of 98 orcas in 1995, the population experienced a decline of almost 20% in the late 1990s, leaving 80 killer whales by 2001 (ODFW, 2024; NOAA, 2025).

The current population size for SROs (as of July 1, 2024) is 73 orcas (25 in J pod, 15 in K pod, and 33 in L pod) (Center for Whale Research, 2025; MMC, 2025). In the last decade, every census showing population growth has been followed by a subsequent decline. The Center for Whale Research’s data shows that survival rates are tied to Chinook salmon abundance, and recovery of the SROs population cannot occur without an increase in this prey resource.

The Northwest Fishery Science Center recently used a population viability model to project the SROs’ population size through 2045 under three different scenarios (Figure 5) (ODFW, 2024; NMFS, 2021b). All three projections indicate an overall decline in the SROs population over the next 25 years.

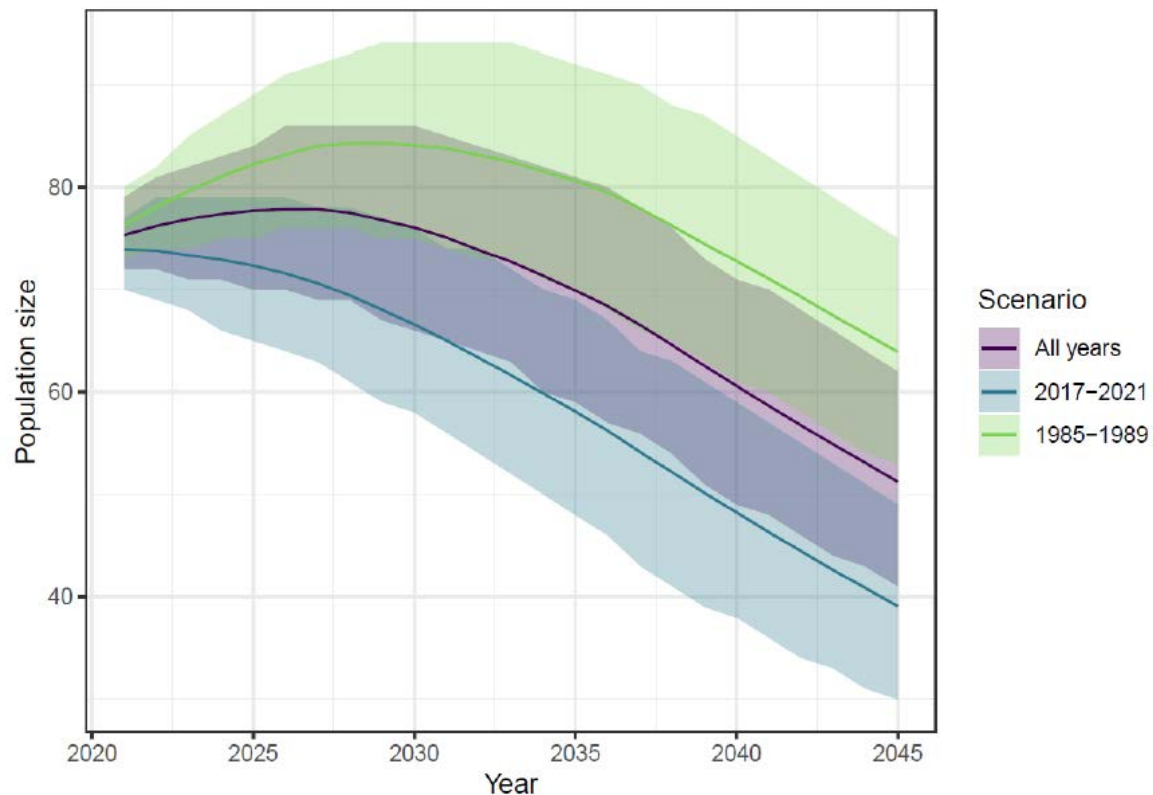


Figure 5. SROs' population size projections from 2020 to 2045 under three scenarios: (1) use of fecundity and survival rates estimated over the entire time series (1985–2021, purple), (2) use of rates estimated over the last five years (2017–2021, blue), and (3) use of the highest estimated survival and fecundity rates (1985–1989, green) (NMFS 2021b)

Key Threats to Southern Resident Orcas

According to the SRO federal recovery plan (NMFS, 2008), the National Marine Fisheries Service identified key threats to the survival and recovery of the SROs (Figure 6).

Prey availability - Reductions in the abundance of Chinook salmon in the Pacific Northwest over the last 150 years due to overfishing, habitat loss, degradation, poor hatchery practices, climate change, and hydropower operations on the Columbia River and other rivers.

In addition to reductions in the quantity of prey, a decrease in the quality of prey is also apparent. Many populations of Pacific salmon, including Chinook salmon, have experienced a decrease in physical size over the past several decades. Potential reasons for this include ocean conditions, as well as harvest and fish culture practices. Smaller prey may result in fewer calories being consumed per unit of foraging effort for the orcas, leading to reduced foraging efficiency and more energy expended to meet dietary needs.

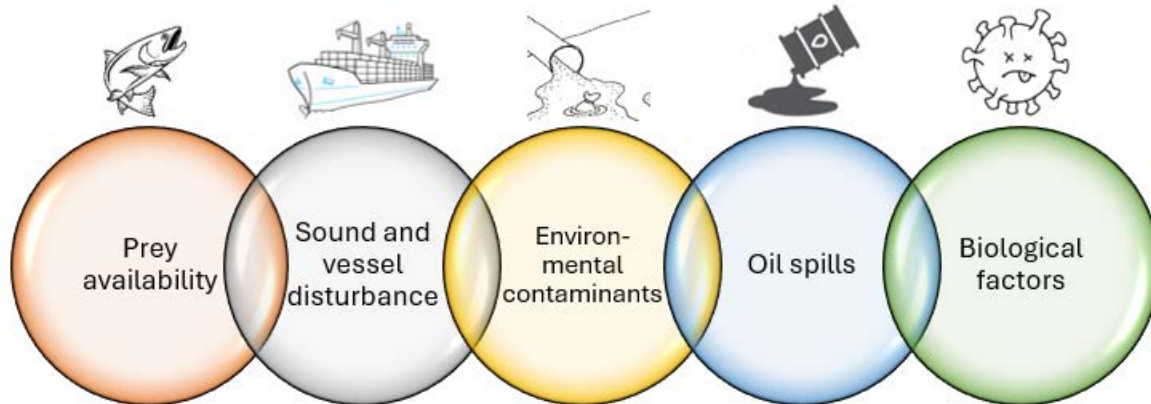


Figure 6. Key threats to the Southern Resident Orcas

Sound and vessel disturbance - Noise from vessel traffic, dredging/drilling, construction activities, and ocean energy developments can potentially interfere with the SROs' ability to communicate with each other and forage efficiently. Commercial shipping, ferry operations, whale watching, and recreational boating traffic have expanded within the northeastern Pacific region in recent decades. Vessel noise may mask or prevent the perception of vocalizations made by orcas, interfering with communications essential for maintaining social structure and cohesion. SROs respond to close-range vessel encounters with short-term behavioral changes, including increased swimming speed, less directed swimming paths, and decreased foraging.

The development of marine renewable energy projects off the Oregon Coast is currently being investigated, with planning underway to test wave energy devices at a facility located 2 or 6 nautical miles off the coast near Newport, Oregon, and possible commercial development of offshore wind facilities 18 miles off the southern Oregon coast. The installation or operation of ocean energy infrastructure may produce sound at levels exceeding ambient conditions, which could have a range of effects on marine mammals.

Environmental contaminants - Contaminants known as persistent organic pollutants (POPs), consisting of organochlorines such as polychlorinated biphenyls (PCBs), dichlorodiphenyltrichloroethane (DDT), and polybrominated diphenyl ethers (PBDEs), are considered one of the greatest contaminant risks to SROs because they are slow to degrade in the environment and accumulate in the orcas' bodies over time. Even though many types of POPs have been banned in the United States and Canada, they continue to persist in the environment and are still manufactured in other countries. Contaminants can be

transported to the eastern North Pacific by ocean currents and through the atmosphere. POPs bioaccumulate in top marine predators such as orcas through their consumption of contaminated prey. High levels of POPs have been detected in Chinook salmon from Puget Sound and the lower Columbia River, likely due to large urban and industrial areas near those waterbodies. The Southern Residents have been exposed to POPs for several decades, and modeling suggests that it may take up to 60 years for PCB concentrations in the Southern Residents to decline to levels considered harmless to marine mammals.

Attention has also been focused recently on chemicals known as “contaminants of emerging concern” (CECs). CECs are found in common household products such as pharmaceuticals and personal care products, but are also produced in industrial processes. CECs can be challenging to treat in wastewater and are discharged into waterbodies through effluent from treatment plants. CECs have been detected in SROs, but the effects of these chemicals on marine mammals remain largely unknown (ODFW, 2024).

Oil spills - The likelihood of a significant oil spill in the northeastern Pacific region is low; however, if one were to occur, the impacts could be severe for orcas and other coastal organisms. Inhalation of vapors at the water’s surface and ingestion of polycyclic aromatic hydrocarbons (PAHs) during feeding are the most likely pathways of exposure for orcas. Marine mammals acutely exposed to PAHs can experience lung diseases, liver disorders, neurological damage, and reproductive failure. Oil spills can also significantly affect prey populations that the SROs depend upon.

Biological factors - The SROs’ small population size makes the community vulnerable to catastrophic events, such as oil spills and disease outbreaks, and can exacerbate the effects of acute and chronic stressors. The relatively high degree of inbreeding within the Southern Resident population suggests that inbreeding depression is likely a factor that is inhibiting the population’s recovery. Studies also documented poor body condition in a significant proportion of SROs and found that orcas in poor condition were much more likely to die than those in a more robust condition.

Recent population viability analyses indicate that prey availability is the single most crucial factor affecting the population growth of SROs. Sound and vessel disturbance had the second greatest effect on population dynamics, followed by contaminants. However, cumulative effects, which include interactions between the primary threats, determine the overall trajectory of population growth (ODFW, 2024).

International Protective Measures

Global efforts to protect and rescue killer whales (orcas) are addressed in two key international agreements:

- The Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES, 1973).

Killer whales were placed on the CITES Appendix II in 1979, which requires all international shipments of the species to be accompanied by an export permit issued by the proper management authority of the country of origin. The United States joined and ratified this Convention on January 14, 1974.

- The United Nations Convention on the Conservation of Migratory Species of Wild Animals (1979).

In 2002, killer whales were added to Appendix II of the Convention. This designation is given to migratory species that “have an unfavorable conservation status and require international agreements for their conservation and management, as well as those which have a conservation status which would significantly benefit from the international cooperation that could be achieved by an international agreement” (Article IV of the Convention).

The International Union for Conservation of Nature (Reeves et al., 2017) lists killer whales as “data deficient” or species of “Lower Risk/Conservation Dependent” on its Red List.

Federal Protective Measures

The National Marine Fisheries Service (NMFS) designated the SROs as depleted under the Marine Mammal Protection Act in 2003 (68 FR 31980). In 2005, NMFS listed the SROs' distinct population segment (DPS) as endangered under the U.S. Endangered Species Act (ESA) (70 FR 69903) and produced a Southern Resident killer whale recovery plan in 2008 (NMFS, 2008). NMFS reviews the status of the SROs DPS every five years, and in its most recent review in 2021, concluded that the DPS should remain listed as endangered (NMFS 2021b; ODFW, 2024).

The NMFS recovery plan emphasizes that recovery of the SRO's DPS is a long-term effort that necessitates cooperation and coordination among West Coast communities, spanning from California to British Columbia, involving federal and State agencies, Tribes, non-profit organizations, industries, the academic community, and concerned citizens.

State Protective Measures

In 2004, *the State of Washington* added SROs to its list of endangered species (WSR 04-05-110). The Washington Department of Fish and Wildlife reviewed orcas' status in 2023 and

recommended that this type of killer whale remain listed as endangered in the state due to serious concerns with the Southern Resident population (Stocking, 2023).

The Government of Canada, through the Committee on the Status of Endangered Wildlife in Canada, designated SROs as endangered species in 2001, and they are listed in Schedule 1 of the Species at Risk Act (SARA) (S.C. 2002, c. 29).

In February 2024, *the Oregon Fish and Wildlife Commission* voted to amend OAR 635-100-0125 to list SROs as endangered under the Oregon Endangered Species Act. At the time of listing, the Commission also adopted survival guidelines for the species (OAR 635-7100-0138), as required by statute. These rule changes affect decisions made on state-owned or managed lands, including leased lands or where the state holds a recorded easement, and include state waters (“state lands”). In June 2024, the Commission determined that three state agencies - Oregon Department of Fish and Wildlife (ODFW), Oregon Department of State Lands (ODSL, proprietary component), and Oregon Parks and Recreation Department (OPRD) - own or manage lands where SROs or their habitat are found and that the agencies can play a role in SROs’ conservation. Each of these agencies must determine the role its land will serve in SROs’ conservation (ORS 496.182(8)(a)(B); OAR 635-100-0140(6)).

In March 2025, the Commission also determined that five state non-land-owning or managing agencies - Oregon Department of Environmental Quality (ODEQ), Oregon Department of Land Conservation and Development (ODLCD), Oregon State Marine Board (OSMB), Oregon State Police (OSP, Fish and Wildlife Division), and ODSL (non-proprietary component) - have a role to play in SROs’ conservation. These agencies need to provide the Commission with written documentation of their agency’s role and the actions they can take to support SROs’ conservation efforts. Strategies and management plans of the land-owning and non-land-owning agencies will be an essential part of Oregon’s conservation efforts.

ODSL Role in Conservation of Southern Resident Orcas

ODSL Mission, Statutory Obligations and Policies

As the State Land Board’s administrative agency, the Oregon Department of State Lands (ODSL) manages school lands, oversees and protects waterways and wetlands of the State through superior stewardship and service, and it is the state partner for South Slough National Estuarine Research Reserve.

ODSL stewardship, service, and responsibilities are guided by the following Oregon Revised Statutes (ORS), Oregon Administrative Rules (OAR), and policies:

- ORS 273 - State Lands Generally,
- ORS 274 - Submersible and Submerged Lands,
- ORS 541 - Oregon Plan for Salmon and Watersheds,
- ORS 758 - Authority to Construct Lines and Facilities,
- ORS 196 - State Waters and Ocean Resources; Wetlands; Removal and Fill,
- OAR 141-083 - Rules for Granting Easements for Fiber Optic and Other Cables on State-Owned Submerged and Submersible Land Within the Territorial Sea,
- OAR 141-085 - Administrative Rules Governing the Issuance and Enforcement of Removal-Fill Authorizations Within Waters of Oregon Including Wetlands,
- OAR 141-102 - Oregon Essential Indigenous Anadromous Salmonid Habitat (ESH),
- OAR 141-122 - Rules for Granting Easements on Trust Lands,
- OAR 141-123 - Rules for Granting Easements on Non-Trust Lands,
- OAR 141-125 - Administrative Rules for Authorizing Special Uses on State-Owned Land,
- OAR 141-140 - Rules Governing the Placement of Ocean Energy Conversion Devices On, In or Over State-Owned Land Within the Territorial Sea,
- Statewide Planning Goal 19, and
- Oregon Territorial Sea Plan.

State Land Covered by the Plan and the Agency Role

This ESMP covers Oregon's territorial sea under ODSL jurisdiction, which includes the waters and seabed extending three geographical miles seaward from the coastline of the Pacific Ocean (ORS 196.405(6)). The ESMP also includes submersible and submerged lands within the territorial sea as defined in ORS 274.

In this area, ODSL holds both proprietary (ownership) and non-proprietary (regulatory) authority, issuing leases, authorizations (e.g., easement and special use authorization), and removal-fill permits for project development activities.

These lands and ODSL services are presented in Figure 7.

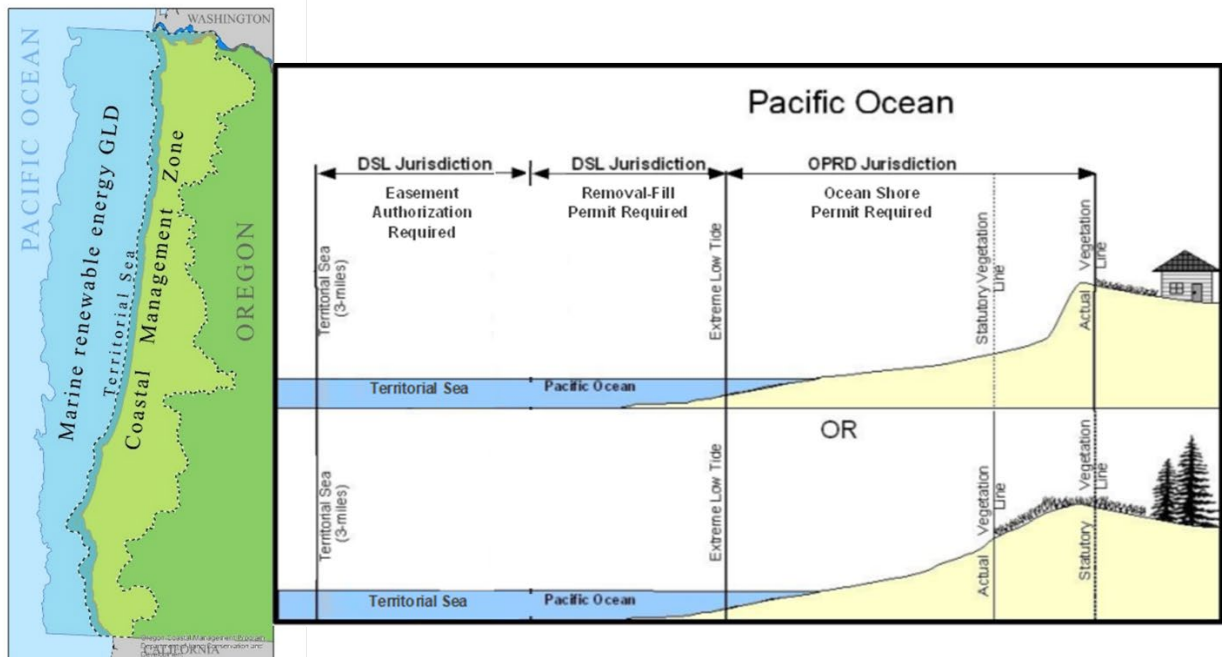


Figure 7. Oregon's territorial sea and ODSL jurisdiction (ODLCD)

Oregon Administrative Rules (OAR) related to Endangered Species Management Plans (OAR 635-100-0140) require that agencies determine the role the state land it owns or manages will serve in the conservation of the SROs. This role may include, but is not limited to, conservation, contribution toward conservation, or take avoidance.

Considering ODSL statutory requirements and policies, the social and economic impacts of SROs' conservation on the state, SROs' conservation needs, the purpose of the agency's lands, the roles that lands other than state lands may play in SROs' conservation, and the biological aspects of SROs management identified by the Oregon Department of Fish and Wildlife (ODFW) in its SROs biological assessment, ODSL defines the role its lands play in SROs' conservation as "contributing to conservation."

ODSL can maintain and implement essential actions that contribute to the conservation of SROs through the agency's proprietary and non-proprietary management and practices.

ODSL will also do "take avoidance" actions, where it is appropriate (e.g., requiring cable installation activity to happen only in those months when SROs are unlikely to travel through the territorial sea corridor along the Oregon coast).

Agency Proprietary Practice

DSL is the owner of certain lands, including most submersible and submerged lands within the territorial sea and navigable bays. As a landowner, per statute and rule, there are certain activities DSL may not enter into a contract to allow. DSL cannot grant permission for the following activities:

- Exploration for Minerals on State-Owned Submersible and Submerged Lands Within the Territorial Sea and Navigable Bays (ORS 274.610),
- Removal of kelp or other seaweed for commercial purposes on state-owned land. (OAR 141-125-0110 (14)),
- Exploration, development, or production of oil, gas, or sulfur is prohibited in the territorial sea (2010 Note to ORS 274.710).

ODSL management actions and contribution to the conservation and recovery of the SROs population will be implemented through the following proprietary practices:

Leases and Authorizations

Any person who wants to develop a project and place renewable energy facilities and undersea infrastructure in the territorial sea (e.g., offshore wind platforms, fiber optic and power cables, water, gas, hydrogen pipelines and other utilities, structures or equipment) will obtain a lease or authorization from ODSL. Easement authorization requires approval by the State Land Board. Specific actions during the authorization process for SROs include:

- Application form for authorization requires the inclusion of any state, federal-listed, or candidate endangered species on the project site.
- All applications are circulated to various local, state, federal agencies, and other interested parties to coordinate project review and permits.
- Environmental impact assessment and mitigation measures for construction, installation, and the project's decommissioning must be included in the application package.
- The applicant is recommended to hold public informational hearings to obtain public comments about the project activity and its impact on species, the marine environment, and coastal communities.

- The application process includes a technical review phase where ODSL staff ensure that the proposed project and use conform to and are allowed by local, state, and federal laws, including statewide Planning Goal 19 and the Territorial Sea Plan (TSP).
- The application for easement authorization needs to be approved by the State Land Board (composed of the Governor, Secretary of State, and State Treasurer). This allows additional public comments and testimony during the State Land Board meeting.
- ODSL requires the decommissioning of the seafloor infrastructure at the end of its lifecycle and recovering the area for further habitat.

Joint Agency Review Team under the TSP Parts 4 and 5

The Territorial Sea Plan Part 4 (Uses of the Seafloor) and Part 5 (Use of the Territorial Sea for the Development of Renewable Energy Facilities or Other Related Structures, Equipment or Facilities) require ODSL to convene the Joint Agency Review Team (JART) to facilitate coordination and communication between state agencies in the early stages of project planning, and between representatives of other affected jurisdictions throughout the pre-application and application process for easements and permits in the state territorial sea.

ODSL will invite ODFW, OPRD, including SHPO, ODEQ, ODLCD, the Oregon Department of Geology and Mineral Industries, and other agencies with regulatory or planning authority or advisory expertise to the JART pre-application and application meetings. These meetings will assess the impact of project activities on SROs and develop appropriate mitigation actions.

TSP Parts 4 and 5 require mitigation actions in the following order of priority:

- 1) Avoiding the impact altogether by not taking a certain development action or parts of that action.
- 2) Minimizing impacts by limiting the degree, magnitude, or timing of the development action and its implementation.
- 3) Rectifying the impact by repairing, rehabilitating, or restoring the affected environment.
- 4) Reducing or eliminating the impact over time by preservation and maintenance operations during the life of the development action and by monitoring and taking appropriate corrective measures, and
- 5) Compensating for the impact. Either monetary compensation or by replacing or providing comparable substitute resources or environments.

TSP Parts 4 and 5 also require the applicant to provide the Resource and Use Inventory and Effects Evaluation during the JART pre-application and application meetings to make a final decision by the regulatory agencies regarding easements and permits.

In the written evaluation, the applicant should include the biological and ecological effects on marine habitats and the species that these habitats support.

For the SROs conservation and recovery, factors to consider include, but are not limited to:

- The time frames/periods over which the effects will occur,
- The maintenance of ecosystem structure, biological productivity, and biological diversity,
- Vulnerability of the SROs population and their habitat to the proposed actions,
- The probability of exposure of SROs and habitats to adverse effects from construction, operating, or decommissioning procedures, or accidents.

Agency Non-Proprietary (Removal-Fill) Practice

As it was indicated in the Background section of this Plan, prey availability is the most crucial factor affecting the SROs' population growth. Research found that during summer and early fall (June-November), SROs feed almost exclusively on salmonids (~96% by prey type), with Chinook salmon accounting for 65–72% of the salmonids taken (ODFW, 2024; Ford et al., 1998; Ford & Ellis, 2006). SROs prefer Chinook salmon due to their relatively large size and high fat content, which provides a high energy return for them (Ford & Ellis, 2006).

ODSL management actions can contribute to the conservation and recovery of the SROs population by addressing prey availability, noise disturbance, environmental contaminants, oil spills, and their cumulative effects through the following non-proprietary practices:

Removal-Fill Permits

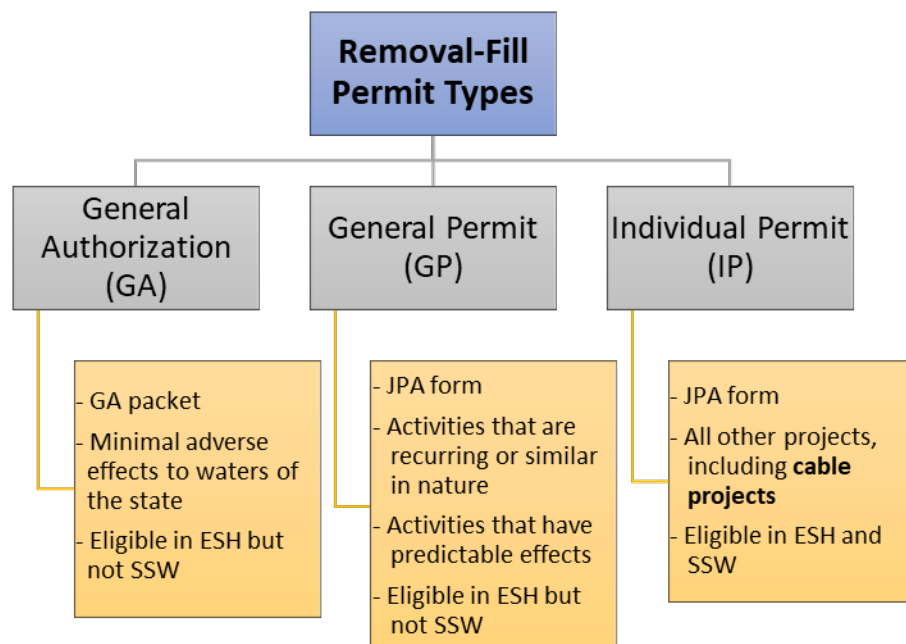
Project activity in waters of this state, including submersible and submerged lands within the territorial sea, that moves materials in water, such as grading or dredging, may require a removal-fill permit from ODSL.

ODSL issues different types of removal-fill permits for the following projects (Figure 8):

- Projects that add, remove, or move more than 50 cubic yards of material in most waters.
- Any amount of removal or fill in the territorial sea that is related to an ocean renewable energy facility requires a permit.

- Projects that add, remove, or move any amount of material in streams designated as Essential Salmonid Habitat, Oregon State Scenic Waterways and adjacent lands within a quarter mile of the waterway, and designated mitigation sites.

As noted above, a removal-fill permit is often required to remove or fill materials in streams, side channels, and adjacent wetlands that have been mapped as Essential Salmonid Habitat (ESH). The ESH designation protects the streams where salmonid species lay eggs and where young fish grow before traveling to the ocean. Chum, sockeye, Chinook, and coho salmon are all sensitive, threatened, or endangered salmonid species whose habitat may be designated as essential and form the main diet for SROs.



Notes: ESH - Essential Salmonid Habitat; SSW - State Scenic Waterways; JPA – Joint Permit Application

Figure 8. Types of Removal-Fill Permits (ODSL)

Specific actions during the removal-fill permits process include:

- Removal-fill application form requires the inclusion of state or federally-listed species on the project site as well as stating if the project site is within designated or proposed critical habitat.
- ODSL requires construction, installation, and the project's decommissioning to be held during the in-water period established by ODFW, unless otherwise approved by ODFW.
- For an Ocean Renewable Energy Facility, ODSL will only authorize a removal-fill activity that complies with the criteria established in the TSP. Permit applications for any activities in the territorial sea must provide an evaluation of the resources and an effects determination of the project on those resources, as required by the TSP. A removal-fill specialist or coordinator will be part of JART pre-application and application meetings to assist in making a final decision.
- For projects outside of the TSP JART requirements, ODSL encourages a pre-application meeting with ODEQ, U.S. Army Corps of Engineers, and other regulatory agencies for large, complex, or controversial projects. The principle underlying the pre-application matrix is that stream or wetland projects that are complex, controversial, or have significant impacts need early involvement by state and federal regulatory and resource management agencies. During such meetings, offered monthly, prospective applicants have one hour to meet with multiple state and federal partners simultaneously to discuss pre-submitted project information and receive feedback in preparation for submitting a permit application. ODSL designed a pre-application meeting screening matrix (Figure 9) and a matrix user's guide to help applicants navigate the requirements. One of the goals of the agencies is that projects should do no lasting harm to aquatic habitat on-site, upstream, or downstream, and that short- and long-term negative impacts will be avoided where possible, minimized to the greatest extent, and mitigated where necessary. Each agency or service has its own regulatory authorities and responsibilities, and those authorities will drive final permit decisions.

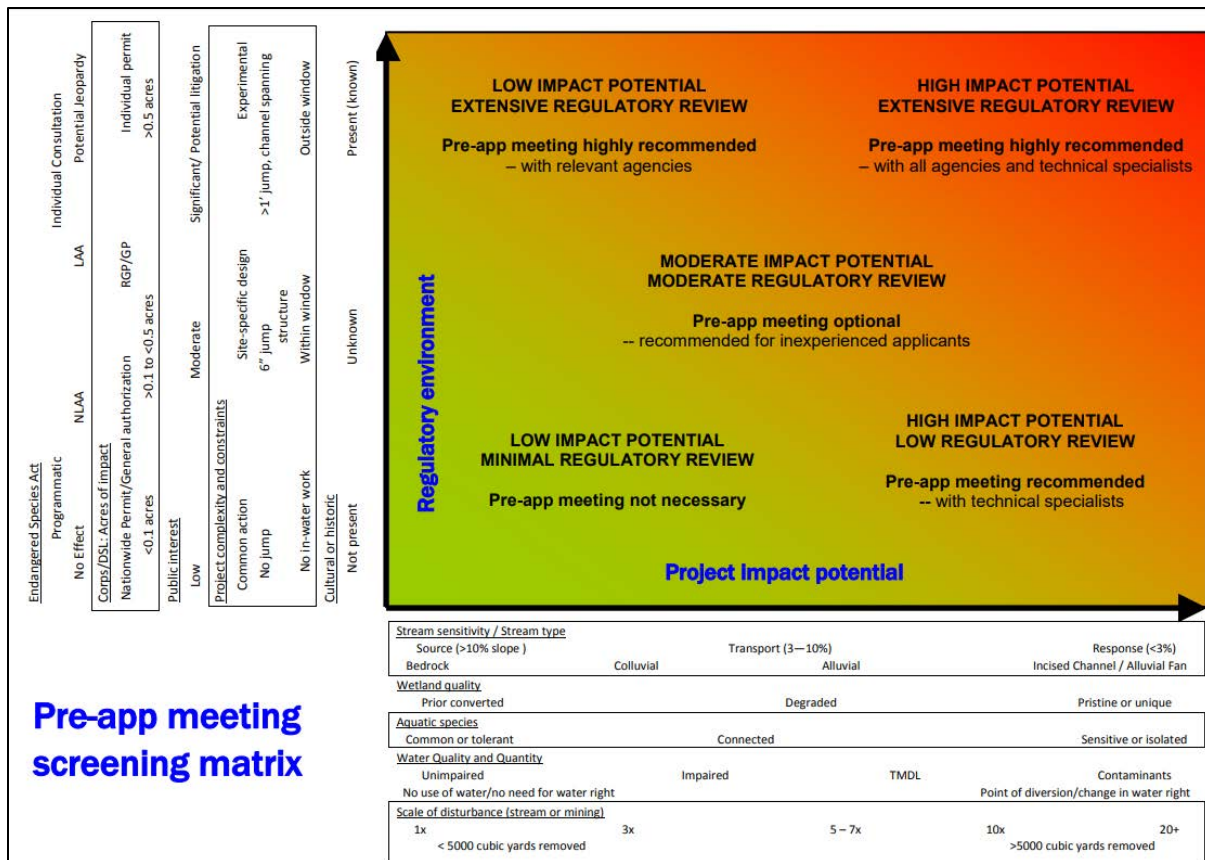


Figure 9. The pre-application meeting screening matrix (ODSL)

- ODSL maintains Oregon's official Essential Salmonid Habitat (ESH) [map](#). The map utilizes scientific data from the ODFW to identify areas critical for salmonids to thrive, which require a permit to remove or fill any material. The ESH map is updated annually, as long as new or updated habitat data are available. Before the update, ODSL seeks input from the Tribes and also holds a public comment period on proposed changes. In addition, anyone can propose map edits through the ESH Review Request Form on the ODSL website at any time of the year. Proposed edits should correct map inaccuracies – for example, if the mapping does not accurately reflect current on-the-ground conditions, or if a new barrier has been introduced that prevents fish from reaching an area. Proposed edits, if accepted after review by ODFW, would be included in the next annual map update.
- Applications for individual permits and general permits established by rule are circulated to various local, state, federal agencies, and other interested parties to coordinate project review and permits. Comments received can inform changes to project design and inform DSL permit conditions.

Adaptive Management Strategy

ODSL Process for Plan Development and Approval

ODSL Planning and Policy Unit's staff developed a draft Southern Resident Orca Endangered Species Management Plan (ESMP) as requested by the Oregon Fish and Wildlife Commission in June 2024 (proprietary component) and in March 2025 (non-proprietary component). A draft ESMP was reviewed by a removal-fill specialist and operational program management. Finally, the ODSL director reviewed and approved the SROs ESMP. This ESMP will be presented to the State Land Board as an informational item.

Monitoring, Evaluation, and Review

ODSL will monitor and implement this ESMP through the requirements for authorizations and removal-fill permit processes described. The number of authorizations by type, and removal-fill permits by type, including how many were issued in ESH streams, are reported annually by fiscal year in DSL's Aquatic Resource Management (ARM) Annual Report, which is presented to the State Land Board and published on DSL's website.

ODSL will ensure that the JART pre-application and application meetings under the Territorial Sea Plan Parts 4 and 5 consider the potential effects on SROs' communication, navigation, and foraging when planning projects in SROs' critical habitat off the Oregon Coast.

ODSL will review this ESMP as needed in case of any significant changes to SROs population status or their conservation needs under the international, federal, and state laws and requirements by the Oregon Fish and Wildlife Commission; changes in ODSL's ability to contribute to SROs conservation and recovery; changes in the agency's jurisdiction and management responsibility; significant changes to ocean conditions and food chain for SROs due to climate change, natural or anthropogenic catastrophic events; and updates in the Oregon Territorial Sea Plan.

ODSL Coordination with the Other Agencies and Efforts

ODSL acknowledges that different directives and goals for other state-owning land agencies will result in individual Endangered Species Management Plans unique to each agency.

ODSL manages submersible and submerged lands within the territorial sea, where SROs could be observed and travel off the Oregon coast. ODSL also contributes to the conservation of salmonids, which are the primary dietary source for SROs. The agency will coordinate its efforts with various stakeholders through the proprietary authorizations and removal-fill permits processes, JART pre-application and application meetings under the

TSP Parts 4 and 5, participation in ODFW events and working groups as resources allow, and aligning the agency's efforts with the federal recovery plan for SROs.

References

- Center for Whale Research. (2025). About Orcas
<https://www.whaleresearch.com/aboutorcas> (accessed May 2, 2025)
- CITES (Convention on International Trade in Endangered Species of Wild Fauna and Flora). (1973). <https://cites.org/eng> (accessed April 22, 2025)
- Ford, J. K. B., G. M. Ellis, L. G. Barret-Lennard, A. B. Morton, R. S. Palm, & K. C. Balcomb III. (1998). Dietary specialization in two sympatric populations of killer whales (*Orcinus orca*) in coastal British Columbia and adjacent waters. *Canadian Journal of Zoology* 76: 1456–1471.
- Ford, J. K. B. & G. M. Ellis. (2006). Selective foraging by fish-eating killer whales (*Orcinus orca*) in British Columbia. *Marine Ecology Progress Series* 316: 185–199.
- Krahn, M. M., P. R. Wade, S. T. Kalinowski, M. E. Dahlheim, B. L. Taylor, M. B. Hanson, G. M. Ylitalo, R. P. Angliss, J. E. Stein, & R. S. Waples. (2002). Status review of Southern Resident killer whales (*Orcinus orca*) under the Endangered Species Act. NOAA Technical Memorandum NMFS-NWFSC-54, U.S. Department of Commerce, Seattle, Washington.
- MMC (Marine Mammal Commission). (2025). Southern Resident Killer Whale
<https://www.mmc.gov/priority-topics/species-of-concern/southern-resident-killer-whale> (accessed June 11, 2025)
- National Oceanic and Atmospheric Administration (NOAA). (2025). Killer Whale (*Orcinus orca*) <https://www.fisheries.noaa.gov/species/killer-whale> (accessed May 13, 2025)
- NMFS (National Marine Fisheries Service). (2008). Recovery plan for Southern Resident killer whales (*Orcinus orca*). Northwest Region, National Marine Fisheries Service, Seattle, Washington.
- NMFS (National Marine Fisheries Service). (2021a). Revision of the critical habitat designation for Southern Resident killer whales, final biological report (to accompany the final rule). West Coast Region, National Marine Fisheries Service, Seattle, Washington.

NMFS (National Marine Fisheries Service). (2021b). Southern Resident killer whales (*Orcinus orca*) 5-year review: summary and evaluation. West Coast Region, National Marine Fisheries Service, Seattle, Washington.

ODFW (Oregon Department of Fish and Wildlife). (2024). Biological Assessment of Southern Resident Orcas (*Orcinus orca*) in Oregon and Evaluation of Criteria to Classify the Species as Endangered under the Oregon Endangered Species Act. Salem, Oregon.

ODFW (Oregon Department of Fish and Wildlife). (2025). Oregon Department of Fish and Wildlife Endangered Species Management Plan for Southern Resident Orcas (*Orcinus orca*). Salem, Oregon.

ODSL (Oregon Department of State Lands). (2025). Essential Salmonid Habitat Map. <https://maps.dsl.state.or.us/esh> (accessed June 1, 2025)

Oregon Territorial Sea Plan, Part Five: Use of the Territorial Sea for the development of renewable energy facilities or other related structures, equipment or facilities. (2019). Oregon Department of Land Conservation and Development, Salem, Oregon
https://www.oregon.gov/lcd/OCMP/Documents/TSP_Part5_PublicationVersion_correctedE_Ps_01172023.pdf (accessed June 2, 2025)

Oregon Territorial Sea Plan, Part Four: Uses of the Seafloor. (2023). Oregon Department of Land Conservation and Development, Salem, Oregon
<https://www.oregon.gov/lcd/OCMP/Documents/TSP%20Part%20Four%20-%20Uses%20of%20the%20Seafloor%20.pdf> (accessed June 2, 2025)

Reeves, R., Pitman, R.L. & Ford, J.K.B. (2017). *Orcinus orca*. The IUCN Red List of Threatened Species 2017: e.T15421A50368125. <https://dx.doi.org/10.2305/IUCN.UK.2017-3.RLTS.T15421A50368125.en> (accessed June 19, 2025)

Stocking, J. J. (2023). Draft periodic status review for the Orca. Washington Department of Fish and Wildlife, Olympia, Washington. 24 + iii pp.
https://wdfw.wa.gov/sites/default/files/publications/02459/draft_wdfw02459.pdf (accessed June 10, 2025)