



ISSUE ACTION GROUP RECOMMENDATIONS REPORT

To: Warrior & Coosa Cooperative Relicensing Teams (WCRT & CCRT)

From: Jim Crew, E6 TE&S IAG Chairperson

cc: Project Files

Date: January 6, 2003

RE: E6 IAG Report

Warrior & Coosa Cooperative Relicensing Team Members:

The E6 Threatened, Endangered and Sensitive (TE&S) Species Issue Action Group (IAG) respectfully submits to the WCRT & CCRT this report including our IAG's recommendations to address the TE&S Species issue relative to the tasks outlined in the E6 IAG work plan. Please note that the recommendations put forth were reached by consensus and are designed to address TE&S Species concerns as represented in the aforementioned work plan.

The following items are included in this IAG Report:

1. IAG Recommendations January 29, 2002
2. IAG Work Plan August, 2001
3. Meeting Notes August 07, 2001
4. Meeting Notes September 04, 2001
5. Meeting Notes October 24, 2001
6. Meeting Notes January 15, 2002

If you would like any additional information or have any questions regarding this IAG Report, please feel free to contact me at (205) 257-4265 or by email at jfcrew@southernco.com.

Issue Action Group: E6 Threatened, Endangered & Sensitive Species

IAG Recommendations

Draft December 20, 2002*

Warrior and Coosa Projects Combined

IAG Members

Chairperson: Jim Crew	APC	JFCrew@southernco.com	(205) 257-4265
Facilitator: Kelly Schaeffer Kleinschmidt		Kelly.Schaeffer@KleinschmidtUSA.com	(703) 451-8370
Sara Chubb	USFS	schubb@fs.fed.us	(334) 241-8139
Tom Counts	USFS	tcoumts@fs.fed.us	(205) 489-5111
Carl Couret	USFWS	carl_couret@fws.gov	(334) 441-5181
Jon Hornsby	ADCNR	jhornsby@dcnr.state.al.us	(334) 242-3420
Henry Mealing	Kleinschmidt	Henry.Mealing@KleinschmidtUSA.com	(803) 822-3177
Malcolm Pierson	APC	JMPierso@southernco.com	(205) 664-6177

Summary of Tasks

IAG members in accordance with the E6 TE&S Species Work Plan completed in full or in part the following tasks:

- Produced a list of Threatened, Endangered and Sensitive species for the Coosa and Warrior Basins.
- Identified the status of each species – Federal, State and Global rank.
- Researched and distributed existing restoration plans to IAG members for the identified species.
- Discussed additional information sources on a case by case basis.
- Created recommendations for the CCRT and WCRT.

Summary of Meetings

Meeting Date	Products Produced and/or Resolution
08-07-2001	Finalized Work Plan, Flattened Musk Turtle
09-04-2001	TE&S Species Database
09-11-2001	IAG Progress Report
10-24-2001	Revisions to the TE&S Species Database
01-15-2002	Draft IAG Recommendations
01-29-2002	Final IAG Recommendations and IAG Closure Form

Discussion

The Coosa Ecological Resource Advisory Team and the Warrior Cooperative Relicensing Team both stated in their Ecological Issue Statements that they were concerned with the “effect of project operations on threatened, endangered, or sensitive species (aquatic and terrestrial) that inhabit the project study area.” In order to assess these effects, the E6 IAG was formed and

* This format is an update of the document originally used to present the E6 recommendations in January 2002.

Issue Action Group: E6 Threatened, Endangered & Sensitive Species

IAG Recommendations

Draft December 20, 2002*

tasked with gathering information describing the existing state of TE&S Species in both the Coosa and Warrior basins. The IAG, composed of various interested stakeholders, working together over a six-month period successfully developed the recommendations found below. This IAG has created a TE&S Species database and collected several restoration plans to help in future management decisions regarding TE&S Species. This IAG established a group of informed individuals that can assist other IAGs in developing PM&E measures, and evaluating effects of operation alternatives on TE&S Species as the relicensing process moves forward.

Recommendations

The E6 IAG proposes the following recommendations to the WCRT and the CCRT.

- 1) Make the TE&S Species database available to other IAG within the relicensing process.
- 2) Reconvene the E6 IAG should TE&S Species need further analysis as to the effects of project alternatives and recommendations.

APC will begin drafting the TE&S Species existing environment section of the Environmental Assessment in February 2003, which will characterize the state of TE&S Species within project boundaries..

All E6 Wetlands documents (work plan, meeting notes, and recommendations) can be found on the Internet at www.southerncompany.com/alpower/hydro

* This format is an update of the document originally used to present the E6 recommendations in January 2002.

Issue Action Group: E6 Threatened, Endangered and Sensitive Species

Revised: 02-21-02

Warrior and Coosa Projects Combined
www.southerncompany.com/alpower/hydro

E6 IAG WORK PLAN

Chairperson: Jim Crew APC JFCrew@southernco.com (205) 257-4265
Facilitator: Kelly Schaeffer Kleinschmidt Kelly.Schaeffer@KleinschmidtUSA.com (703) 451-8370

Members:

Name	Organization	E-mail	Work Phone
Sara Chubb	USFS	schubb@fs.fed.us	(334) 241-8139
Tom Counts	USFS	tcounts@fs.fed.us	(205) 489-5111
Carl Couret	USFWS	carl_couret@fws.gov *	(334)-441-5181
Jeff Duncan	NPS	jeff_duncan@nps.gov	(423) 266-1150
Jon Hornsby	ADCNR	jhornsby@dcnr.state.al.us	(334) 242-3420
Henry Mealing	Kleinschmidt	Henry.Mealing@KleinschmidtUSA.com	(803)-822-3177
Malcolm Pierson	APC	JMPierse@southernco.com	(205) 664-6177

Issue Statement

WE6 & CE6 Threatened & Endangered Species (T&E) – Effect of project operations on threatened, endangered, or sensitive species (aquatic and terrestrial) that inhabit the project study area.

* The US Department of Interior including the US Fish and Wildlife Service has suspended electronic communication and it is not known when service will be restored. Communication with USFWS must be conducted via mail, fax and or telephone.

IAG Tasks and Responsibilities

The immediate task and responsibility of the E6 - IAG is to develop a list and status of Sensitive, Threatened and Endangered species within the Coosa and Warrior Basins. This list will be used in subsequent relicensing studies for the Coosa – Warrior Cooperative Relicensing Process.

Work Scope & Product

- **Task 1** Produce a generic list of Sensitive, Threatened, and Endangered species for the Coosa and Warrior Basins; subdivide by county and subdivide into project area of effect.
- **Task 2** Provide the status of each species – Federal status, State status, and Global rank.
- **Task 3** Determine if there are existing restoration plans for the identified species
- **Task 4** Identify if other sources of information are needed
- **Task 5** Provide information and recommendation to the Eco RAT and WCRT

Schedule

The E6 – IAG is anticipated to begin work with a kick-off meeting the first week of August 2001 by telephone conference call. The Group will meet periodically between August and October (6 meetings anticipated). The following is a “projected” schedule of work that may change with the Group’s approval. These meetings can be either conference calls or “face to face” meetings based on the Group’s approval.

- Meeting 1 Kick-off meeting – Discuss Work plan - first week of August 2001
- Meeting 2 Discuss results of Task 1 & 2 – end of August 2001
- Meeting 3 Discuss results of Task 3 – 2nd week of September 2001
- Meeting 4 Give preliminary update at September WCRT and RAT meeting
- Meeting 5 Discuss Task 4 – end of September 2001
- Meeting 6 Give recommendations to Eco Rat and WCRT – mid October 2001

MEETING NOTES

Issue Action Group: E6 Threatened, Endangered and Sensitive Species

Meeting Notes: Conference Call, August 7, 2001

Warrior and Coosa Projects Combined

Meeting Attendees:

Sarah Chubb	USFS	schubb@fs.fed.us
Tom Counts	USFS	tcoumts@fs.fed.us
Carl Couret	USFWS	carl_couret@fws.gov
Jim Crew	APC	JFCrew@southernco.com
Jon Hornsby	ADCNR	jhornsby@dcnr.state.al.us
Henry Mealing	Kleinschmidt	Henry.Mealing@KleinschmidtUSA.com
John Peconom	Kleinschmidt	John.Peconom@KleinschmidtUSA.com
Malcolm Pierson	APC	JMPierson@southernco.com
Kelly Schaeffer	Kleinschmidt	Kelly.Schaeffer@KleinschmidtUSA.com
Plez West	USFS	pwest@fs.fed.us

Action Items

Completed action items to be sent to Jim Crew and Henry Mealing via email by August 17, 2001.

- Carl Couret to check for additional threatened, endangered, and sensitive (TE&S) species information and possible GIS data layers available from USFWS.
- Henry Mealing to finish review of the ACT studies for applicable information on TE&S species.
- Henry Mealing to contact Jeff Duncan by the 3rd week of August to get information on the “Imperiled Species of the Southeast”
- Henry Mealing to prepare example of Spreadsheet 1 to send to IAG by 8-15-01 for review and comment.
- Jon Hornsby to contact Greg Lein, Alabama State Lands Division and request State Threatened, Endangered & Sensitive (TE&S) species information.
- Malcolm Pierson to contact Alabama Heritage Program (AHP), Terra Minascow about TE&S information; Tom Counts will assist Malcolm in this effort.
- Henry Mealing and Malcolm Pierson to develop and distribute Draft version of Spreadsheet 1 & 2 by week of August 27 for the IAG to review and comment.
- Jim Crew to research navigational flow requirements for both the Warrior and Coosa rivers.

Issue Action Group: E6 Threatened, Endangered and Sensitive Species

Meeting Notes: Conference Call, August 7, 2001

- Jim Crew, Malcolm Pierson, Tom Counts, Sarah Chubb, and Plez West to work out details of partnership between APC and USFS regarding Flattened Musk Turtle.
- Next meeting of the IAG will be on September 4, 2001 at 2:00 pm Central Time

Meeting Notes

These notes summarize the major discussion items and are not intended to be a transcript or analysis of the meeting.

Introduction

Jim Crew welcomed all the E6 Issue Action Group participants and introduced Kelly Schaeffer as the meeting's facilitator. Kelly began the conference call meeting by reviewing the agenda, meeting objective, and introducing the meeting's ground rules. Kelly asked that all participants state their name before commenting and speak slowly so that the group can clearly understand each other and become familiar with each other's voices. Sarah Chubb requested that the cooperative study effort concerning the Flattened Musk Turtle be added to the agenda.

Meeting Objective: 1) Assemble the E6 IAG members, 2) discuss the goals of the E6 IAG, 3) discuss appropriate methods for identifying TE&S species, 4) decide on what information the Group should present at the September Meeting of the WCRT and Eco RAT, 5) assign work tasks and schedule and 5) set another meeting date and time.

IAG E6 Review

Henry Mealing informed the group that in order to increase efficiency for participants in the relicensing process that the TE&S species work for both the Warrior and the Coosa Rivers would be combined into one IAG. The Group then reviewed and discussed the E6 IAG Sheet (sent 7-20-01) and the proposed work methodology outline (sent 8-3-01). Henry stated that the goal of the E6 IAG is to have a work product that can be presented to the Eco RAT and the WCRT for their consideration at the September Meetings. Throughout the meeting there was discussion of the details of the proposed methodology including discussion on navigation flows in both the Coosa and Warrior Rivers and their effects on downstream TE&S species. This discussion resulted in the decision to gather TE&S information for the Alabama River downstream of Jordan Dam to Clairborne Lock and Dam. There was also some discussion on how to classify and address sensitive species because including sensitive species in the first level of analysis may create unnecessary work and too large a scope. After discussing the IAG outline and the proposed methodology in detail and offering suggestions on how to improve each, the participants agreed that they would be acceptable. At the end of the meeting several assignments were made to begin the IAG work tasks (see action items).

Issue Action Group: E6 Threatened, Endangered and Sensitive Species

Meeting Notes: Conference Call, August 7, 2001

Flattened Musk Turtle

Tom Counts, Sarah Chubb, and Plez West presented the benefits of conducting a cooperative study of the flattened musk turtle between USFS, APC, the Nature Conservancy, and Univ. of Alabama Birmingham. The USFS has funds that need to be allocated by the end of September 2001 to study this species in specific stream reaches and would like APC to partner with them in conducting these studies over a larger area. Jim Crew and Malcolm Pierson expressed APC's desire to gather information on this species. Both APC and the USFS agreed to review the work scope proposal and to incorporate into the work scope to the extent possible, relicensing issues regarding the flattened musk turtle. APC agree to partner with the USFS on this study and together will work out the details of their partnering agreement over the next few weeks.

Conclusion and Next Meeting

All the participants agreed that the conference call format worked well. Any questions should be directed to Jim Crew.

The next meeting for the IAG will be September 4, 2001 from 2:00pm-3:00pm Central Time. Instructions and an agenda will be forwarded to IAG team members prior to September 4, 2001.

Issue Action Group: E6 Threatened, Endangered and Sensitive Species

Meeting Notes: Conference Call, September 4, 2001

Warrior and Coosa Projects Combined

Meeting Attendees:

Sara Chubb	USFS	schubb@fs.fed.us
Tom Counts	USFS	tcounts@fs.fed.us
Jim Crew	APC	JFCrew@southernco.com
Henry Mealing	Kleinschmidt	Henry.Mealing@KleinschmidtUSA.com
John Peconom	Kleinschmidt	John.Peconom@KleinschmidtUSA.com
Malcolm Pierson	APC	JMPierso@southernco.com

Carl Couret could not attend the meeting, so Jim and Henry held a short review meeting with Carl earlier in the day.

Action Items

Completed action items to be sent to Jim Crew and Henry Mealing.

- Henry will follow up on incorporating the Alabama Heritage Program data into the database.
- Malcolm and Carl will review discrepancies between the Federal and State data sets.
- Carl and Henry will work on list of recovery plans currently available.
- Tom Counts will provide USFS sensitive species list for incorporation into the database.

Meeting Notes

These notes summarize the major discussion items and are not intended to be a transcript or analysis of the meeting.

Introduction

Jim Crew welcomed and thanked those in attendance for their continued participation in this IAG and the larger relicensing process. The Group reviewed the meeting's agenda and goals. In accordance with the meeting's agenda the following items were discussed:

Information prepared to date

Henry led the Group through a review of information sent out since the previous meeting. The Group agreed to use the Alabama Heritage Program's state information booklet as a replacement for "Spreadsheet #1". The Group then reviewed "Spreadsheet # 2" information that currently contains both the Federal and State Endangered Species lists by county and basin. Henry noted that there are several conflicting discrepancies between the Federal and State

Issue Action Group: E6 Threatened, Endangered and Sensitive Species

Meeting Notes: Conference Call, September 4, 2001

databases and asked how these discrepancies could be resolved. Both Malcolm and Carl volunteered to review the list and offer suggestions to resolve the discrepancies.

Finalizing the TE&S database

After reviewing the information compiled to date, the IAG agreed on several items for finalizing the database.

- The AHP database information - including LAT/LON location data down to the minute – will be added.
- The latest APC T&E survey data will be added.
- The USFS Sensitive Species list will be included.

The Group discussed how this information will be used during relicensing and several ideas were noted:

- Use the database for geospatial applications,
- Potential integration into species' recovery plans, and
- Possible incorporation of TE&S habitat requirements into the database for long-term use by various agencies.

Presentation at the September EcoRAT & WCRT Meetings

The Group unanimously decided to present a progress report for the upcoming EcoRAT & WCRT meetings. Jim Crew outlined a presentation proposal which included a PowerPoint presentation and a handout updating the larger groups on the IAG's efforts and asked if any of the IAG members present would be interested in presenting specific parts of the PowerPoint presentation. Several members of the IAG volunteered to participate in the presentation. Jim and Henry will work with Group members for their portions of the presentation.

Conclusion and Next Meeting

The next meeting of the E6 IAG will be held at the September 11 & 12, 2001 for updating the EcoRAT and WCRT. After that meeting, the Group will pick a date for its next IAG meeting. Jim and Henry will keep the Group updated on database advances.

Issue Action Group: E6 Threatened, Endangered and Sensitive Species

Meeting Notes: APC Corporate Headquarters October 24, 2001

Warrior and Coosa Projects Combined
www.southerncompany.com/alpower/hydro

Meeting Attendees:

IAG Members:

Sara Chubb	USFS	schubb@fs.fed.us
Jim Crew	APC	JFCrew@southernco.com
Henry Mealing	Kleinschmidt	Henry.Mealing@KleinschmidtUSA.com
Malcolm Pierson	APC	JMPierse@southernco.com
Kelly Schaeffer	Kleinschmidt	Kelly.Schaeffer@KleinschmidtUSA.com

Other Attendees:

Elrand Denson	USFS	edenson@fs.fed.us
Jim Lochamy	APC	JSLOCHAM@southernco.com
Jason Moak	Kleinschmidt	Jason.Moak@KleinschmidtUSA.com
Ron McKittrick	FERC	ronald.mckittrick@ferc.fed.us
Alan Peeples	APC	APEEOPLE@southernco.com
John Peconom	Kleinschmidt	John.Peconom@KleinschmidtUSA.com

Action Items

- Incorporate Forest Service sensitive species data into the TE&S species database.
Jason Moak: Due - November 11, 2001
- Continue to develop the TE&S species database.
All IAG Members: Due - January 15, 2002
- Prepare formal recommendations for the EcoRAT and WCRT.
All IAG Members: Due - January 15, 2002

Meeting Notes

These notes summarize the major items discussed during the meeting and are not intended to be a transcript or analysis of the meeting.

Jim Crew welcomed those in attendance for their continued participation in the E6 IAG process. The group then reviewed their progress in completing the work tasks and responsibilities originally given by the EcoRAT and WCRT in June 2001.

TE&S Species Database –

1. The Forest Service (FS) provided their sensitive species list for inclusion into the database.

Issue Action Group: E6 Threatened, Endangered and Sensitive Species

Meeting Notes: APC Corporate Headquarters October 24, 2001

2. The group reviewed the database and agreed that with a few additions it will be very helpful during the relicensing process as a reference and analysis tool for determining the effects of proposed project operations.
3. Further development of the database will include a focus on federally listed species and FS sensitive species as well as habitat associations and the identification of existing recovery plans and/or species habitat requirements.
4. The IAG will recommend to the EcoRAT and WCRT that areas of concern (Project areas with TE&S species present and current/potential TE&S recovery areas) be identified as an additional step.
5. Carl Couret (USFWS) and Malcolm Peirson (APC) have recommended that the IAG accept all TE&S species information as is and then reevaluate discrepancies as necessary on a case by case basis.

Flattened Musk Turtle - Malcolm provided an update on the partnership between APC and the FS to study the flattened musk turtle. APC and the FS in cooperation with the University of Alabama have contributed matching funds to conduct a two-year study of the flattened musk turtle (Warrior Basin) starting this fall.

Conclusion and Next Meeting

The IAG agreed that at the next meeting we would discuss final recommendations to the EcoRAT and WCRT and discuss discontinuing E6 IAG activity until recommendations for changes in project operations are developed.

The next meeting of the E6 IAG will be held via conference call at 1:00 p.m. CST on January 15, 2002.

E6 IAG - TE&S Species documents and materials are posted on the Internet at www.southerncompany.com/alpower/hydro.

Issue Action Group: E6 Threatened, Endangered and Sensitive Species

Meeting Notes - January 15, 2002 Conference Call

Warrior and Coosa Projects Combined

Meeting Attendees:

IAG Members:

Sara Chubb	USFS	schubb@fs.fed.us
Carl Couret	USFWS	carl_couret@fws.gov
Jim Crew	APC	JFCrew@southernco.com
Henry Mealing	Kleinschmidt	Henry.Mealing@KleinschmidtUSA.com
Malcolm Pierson	APC	JMPierse@southernco.com
Kelly Schaeffer	Kleinschmidt	Kelly.Schaeffer@KleinschmidtUSA.com

Other Attendees:

Jason Moak	Kleinschmidt	Jason.Moak@KleinschmidtUSA.com
John Peconom	Kleinschmidt	John.Peconom@KleinschmidtUSA.com

Action Items

- Forest Service to assist in “fine-tuning” records in the TE&S Species database.
Sara Chubb & Jason Moak: Due - January 25, 2002
- TE&S Species database development to continue throughout the relicensing process.
All IAG Members – Jason Moak manages revisions: Due - Ongoing
- Jason Moak to manage the distribution of the TE&S Species database.
All IAG Members: Due - Ongoing
- Prepare a test run of the database based on Smith and Weiss Lake locales.
Jason Moak: Due - January 25, 2002
- Add a TE&S Species database description into the E6 Closure Form.
Henry Mealing: Due - January 25, 2002
- Mail a CD of the database to Carl Couret.
Jason Moak: Due - January 25, 2002
- Present Final Recommendations to the EcoRat.
Jim Crew & Jason Moak: Due - January 29, 2002

Meeting Notes

These notes summarize the major items discussed during the meeting and are not intended to be a transcript or analysis of the meeting.

Issue Action Group: E6 Threatened, Endangered and Sensitive Species

Meeting Notes - January 15, 2002 Conference Call

TE&S Species Database – In response to comments provided by IAG members at the last E6 meeting, the TE&S Species database was updated with the US Forest Service’s sensitive species information and species habitat preference data was added. The Coosa, Warrior and Alabama Basin TE&S Species database currently contains over 300 species, including detailed species and habitat information for many of these species, and all known recovery plans.

After reviewing the advantages of this database, the IAG expressed an immediate desire to make the information available to other groups within the relicensing process and to continually update records as species information changes. Jason Moak will serve as the database manager, making updates and distributing it to other parties as necessary. In order to best manage the sensitive information in this database individuals or groups can request a copy at any time and will either be given a full copy (including locational data) or a partial copy of the database based on their specific needs.

Closure Form & Final Recommendations- A “Closure Form”, based on the IAG’s work plan, was created to serve as a report to the EcoRat and WCRT. The Closure Form presents the group’s tasks, meetings dates, work products, and accomplishments. The IAG members discussed the draft Closure Form and recommended that more detailed information describing the TE&S Species database is added to the ”Description” section. This description will be included the final Closure Form presented to the EcoRat and WCRT on January 29, 2002. The members agreed to suspend the E6 IAG for now until other IAGs need technical assistance or proposed PM&E measures need to be evaluated.

Conclusion

The E6 TE&S Species IAG will present a final Closure Form at the next EcoRAT and WCRT meeting (to be held January 29, 2002 at APC’s Headquarters in Birmingham, Alabama). After presenting its recommendations, the E6 IAG will suspend activities until recalled by an IAG, the EcoRAT or the WCRT.

E6 IAG - TE&S Species documents and materials are posted on the Internet at www.southerncompany.com/alpower/hydro.