

VALLES CALDERA NATIONAL PRESERVE



Rourke McDermott

VALLES CALDERA

NATIONAL PRESERVE

Sandoval and Rio Arriba Counties

State of New Mexico

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Valles Caldera Trust
2008 Report to Congress
Fiscal Year 2008

VALLES CALDERA NATIONAL PRESERVE

Fiscal Year 2008 – Report to Congress

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Executive Summary

In this, our sixth year of management, we have made great progress in comprehensive planning towards the ecologically and financially sustainable management of the Preserve consistent with the Valles Caldera Preservation Act.

Among the purposes of the Act identified in section 102 is:

“...to establish a demonstration area for an experimental management regime adapted to this unique property which incorporates elements of public and private administration in order to promote long-term financial sustainability consistent with the other purposes enumerated ...”

Other purposes include the protection and preservation of resources, provision of opportunities for public recreation, and sustained yield management for timber production and domestic livestock grazing. As the Trust progresses towards comprehensive management of the Preserve, we also continue our progress towards achieving all purposes and goals established by Congress. For example:

- Preserve-wide planning and innovative approaches to meet both the spirit and intent of National Environmental Policy Act are setting the stage for future efficiencies. A quantified and systematic approach to adaptive management ensures resource protection that can be quantified at multiple scales of time and space. This systematic approach will reduce future costs associated with planning and documentation as well as providing sound legal footing for decision-making.
- For the first time ever the Preserve was open seven days per week during the summer recreation season and provided outdoor recreation and interpretive opportunities to visitors without prior reservations. This expansion in our summer recreation program led to a substantial increase in overall visitation.
- The Preserve continues to be a draw to scientists, educators and researchers from all over the world. Over \$1.6 million of extramural funding established the Preserve as part of a global network in the study of climate, water, carbon, and other local, regional, and global land management issues. Spreading scientific knowledge into our classrooms has also been a focus as programs outreach to educators and students alike.

In spite of our progress, the path to financial self sufficiency continues to challenge every aspect of management. Comprehensive planning and quantifiable analysis has highlighted several of these challenges.

- The ecological condition of the Preserve has been impacted by its intensive use over the past century including logging, road building and grazing. The timber and rangeland resources of the Preserve are in as great, if not greater, need of restoration as those on other public lands in the west. The Preserve’s renewable timber resources will not be contributing measurably to its financial self sufficiency.
- While the demand for access to the Preserve for recreation, education, science, research, and commercial purposes is great; the facilities and infrastructure necessary to support such use is insufficient. Quantitative assessments of facilities find that most buildings do not meet basic

health and safety requirements necessary to permit public access. Except for the roads the Trust has invested in to date, the transportation system on the Preserve does not meet the minimum standards for safety or resource protection.

- While it appears that public access and use (with the potential revenues as derived from fees, donations, fund development, and associated sources) is the key to financial self sufficiency, significant investment will be required. Analysis on deferred maintenance, compliance with Americans with Disability Act Standards, and potential investment in infrastructure and facilities could range from \$15 to \$50 million over the next 10 years. It is also important to remember the investment in the Valles Caldera National Preserve, to date. The initial purchase price was \$101 million and the operating costs since federal acquisition have been approximately \$3.5 million each year.
- The report briefly describes the challenges the Trust faces by not having access to permanent judgment appropriations under section 1304 of Title 31, U.S.C. (the Judgment Fund). The annual cost for liability insurance in FY 2008 increased 105% over FY 2007. In addition, the Trust had difficulty finding a provider willing to underwrite our activities. There simply is not an accepted model for quantifying the risks associated with multiple uses on public lands, especially those associated with hunting and other unguided recreation activities.
- If the Trust had not been able to find a source for general liability coverage, we could not have permitted public use and access to the Preserve without incurring significant financial risk. The obvious solution is an amendment to the Valles Caldera Preservation Act to authorize the access to the Judgment Fund in the event of a claim. It is our intent to request such an amendment in FY 2009.
- The Trust continues to demonstrate efficiencies in fiscal management. Administrative costs, which include fixed costs, account for only 27% of the Trust's annual planned budget. The second largest allocation at 22 percent goes towards providing programs for public access and use. The combined salary and benefits for all employees accounts for only 50 percent of the Trust's budget.

Besides highlighting accomplishments and challenges, this report provides a comprehensive and detailed report of the Trust's operations, activities, and accomplishments for FY 2008, including information on the status of ecological, cultural, and financial resources being managed by the Trust, and benefits provided to local communities.

The report also includes goals for FY 2009. These annual goals include increasing funding through contributions and donations, continuing our activities and services in the community, continuing to address immediate infrastructure needs, and continuing to increase the public's access to the Preserve. The Trust is also setting goals for our continued planning for public access and use and initiating planning for the management and restoration of the Preserve's forests and ecosystems.

Section 1. About Us

1.1 Background

The Valles Caldera Trust (the Trust) is a wholly owned government corporation responsible for the management of the Valles Caldera National Preserve (the Preserve). The Preserve, originally known as the Baca Location No. 1, was operated as a privately owned ranch for over a century prior to its acquisition by the federal government. Federal acquisition occurred in July of 2000 with the passage of the Valles Caldera Preservation Act (Public Law 106-248). The Preserve is comprised of 88,900 acres of National Forest System (NFS) land located in north central New Mexico, Sandoval and Rio Arriba counties. National Forest System land is typically managed by the United States Department of Agriculture, Forest Service. Delegating management of NFS land to a government corporation constitutes an experiment in public land management.

1.2 The Trust

The Trust is staffed by Federal employees and governed by a nine member Board of Trustees (the Board). Seven trustees are appointed by the President, the remaining two are ex-officio; the superintendent of Bandelier National Monument and the Supervisor of the Santa Fe National Forest. On January 10, 2001 the first board of trustees was seated and officially assumed management of the Preserve. The current trustees are listed in Appendix A.

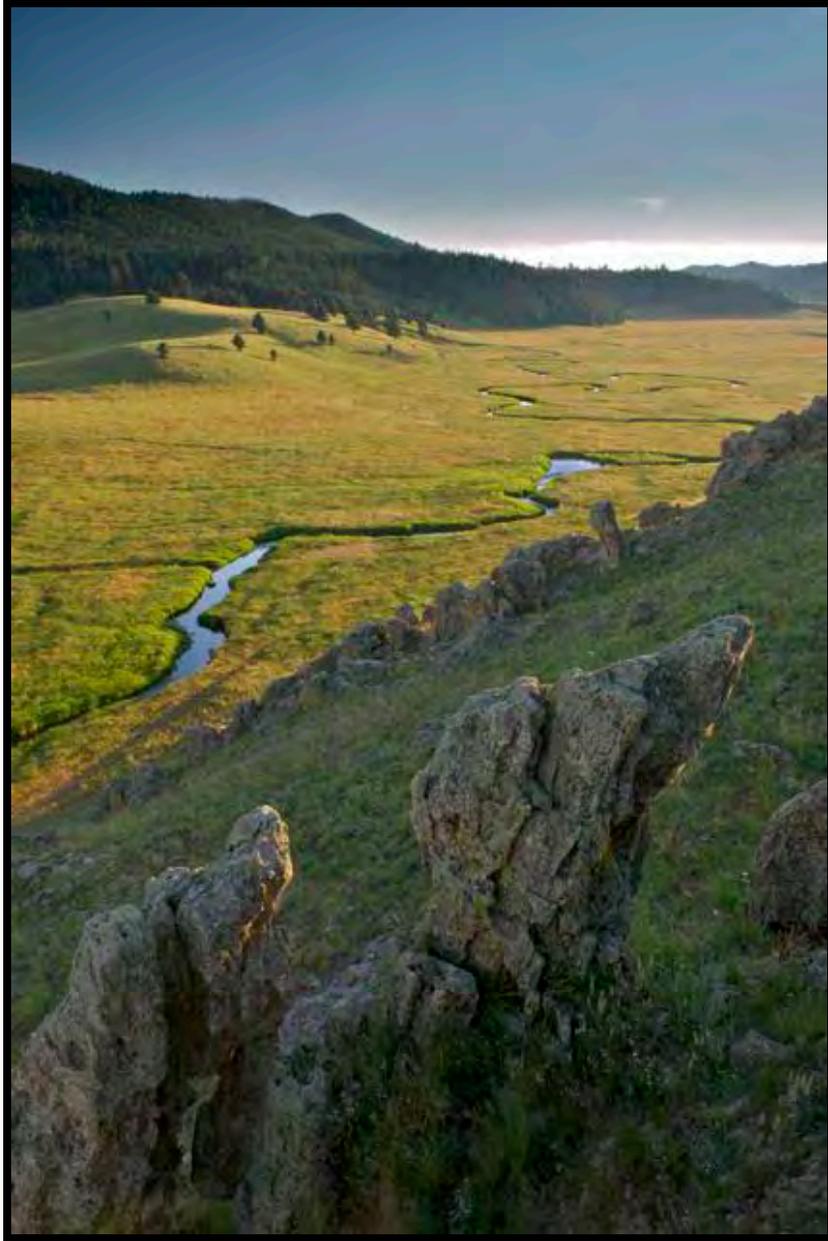
Among the purposes listed for The Valles Caldera Preservation Act (the Act) was, *“to establish a demonstration area for an experimental management regime adapted to this unique property which incorporates elements of public and private administration in order to promote long term financial sustainability consistent with other purposes enumerated in this subsection...”*

Towards this end the Act provided the Trust with certain exemptions and tools different than those available to the United States Forest Service (USFS) which manages most NFS land in the United States. Among these is the ability to retain donated funds and income generated from the management of the Preserve. These funds are retained in an interest bearing account and are available without further appropriations, *“for the administration, preservation, restoration, operation and maintenance, improvement, repair, and related expenses incurred with respect to properties under its management jurisdiction”*. The Trust is considered an agency for the purpose of compliance with Federal environmental laws, including the National Environmental Policy Act (NEPA), but remains exempt from the Forest and Rangeland Renewable Resources Planning Act of 1974, as amended (16 U.S.C. 1600 et seq.).

1.3 The Preserve

The Preserve is located atop the Jemez Mountains in north central New Mexico (Figure 1) and is often referred to as the “crown jewel” of the Jemez. The name “Valles Caldera” refers to the series of expansive grassy valleys or “valles” contained within an approximately 13-mile wide collapsed volcanic crater. “Caldera” is Spanish for cauldron or kettle as well as a geologic term. Most people associate the Preserve with the “Valle Grande” one of the largest of the valles. New Mexico State Highway 4 (NM4) traverses the southern edge of the Valle Grande providing a panoramic view of this iconic landmark as portrayed on the cover photo.

One third of the Preserve consists of expansive, gently sloping grasslands with the remaining two thirds consisting of mountainous forests. Nearly 75 miles of perennial streams originate in the Preserve's forests and meander through its grassland valleys (as shown in the photo below) making the Preserve one of the most diverse areas in the southern Rocky Mountains ecoregion (southern Wyoming to northern New Mexico). The major landscape features and vegetation are depicted in Figure 2.



VALLE SAN ANTONIO – MICHAEL MUDD

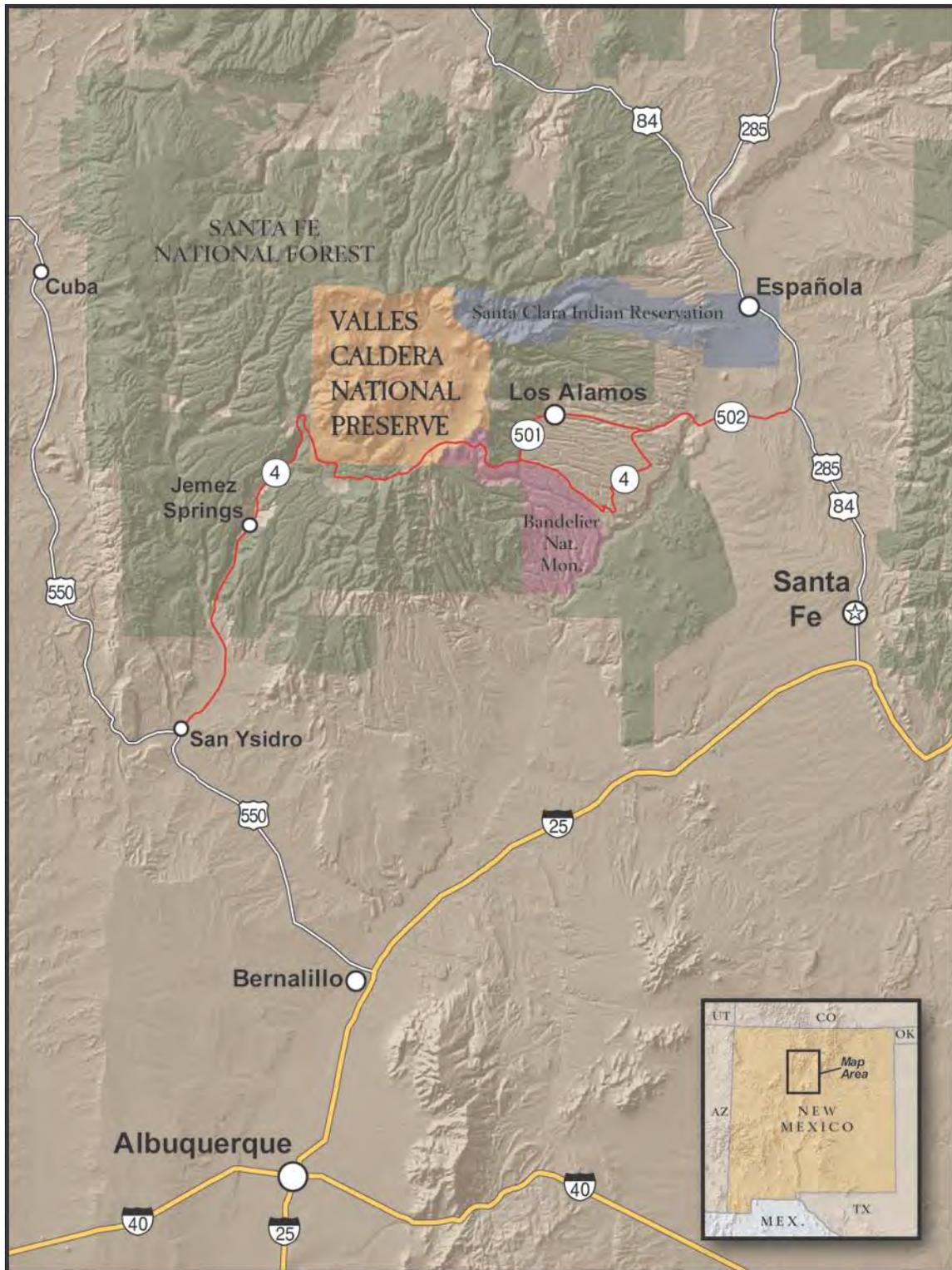


FIGURE 1 – VALLES CALDERA NATIONAL PRESERVE, SANDOVAL AND RIO ARRIBA COUNTIES, NEW MEXICO

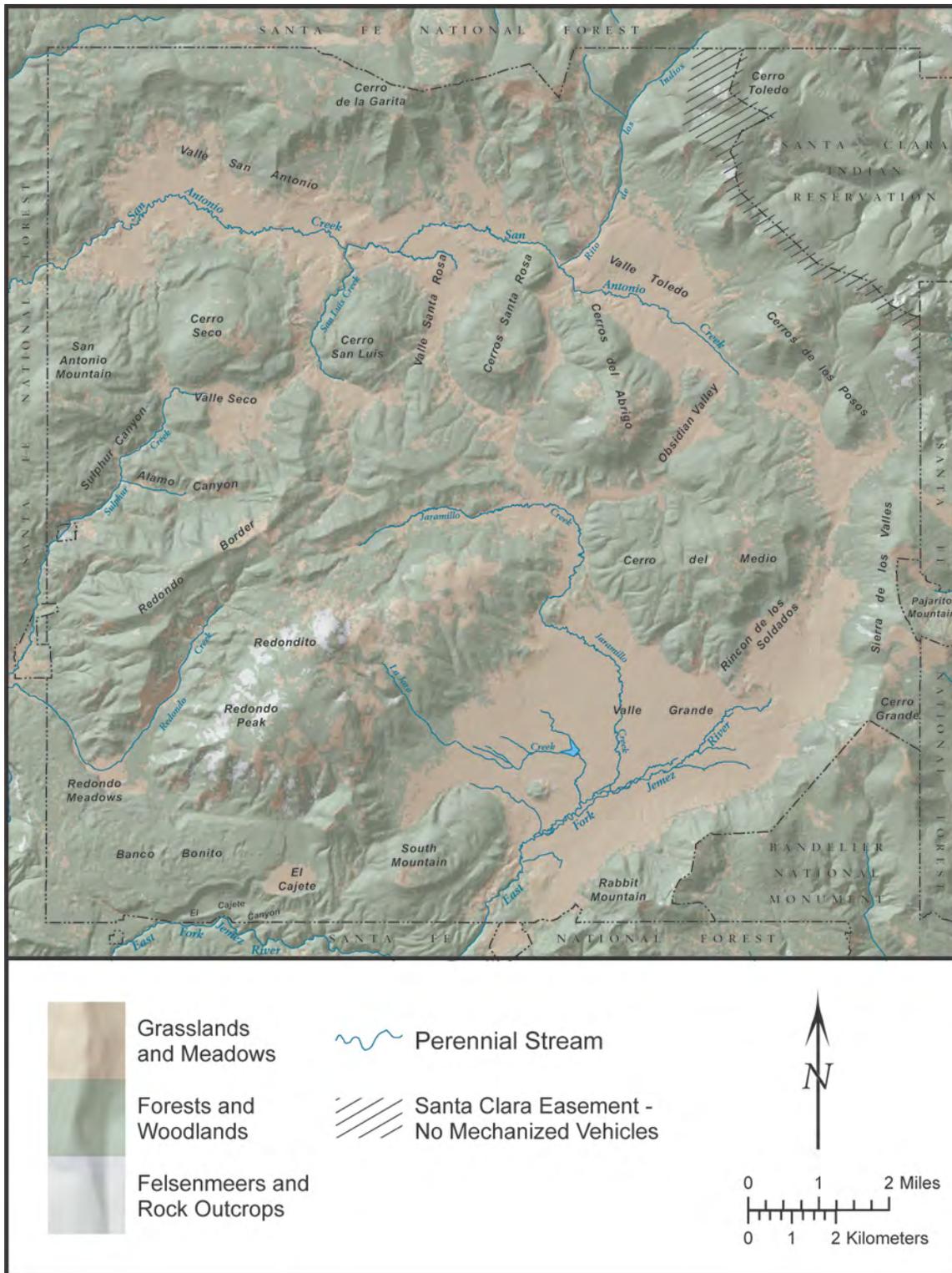


FIGURE 2 – LANDSCAPE FEATURES OF THE VALLES CALDERA

1.4 Management Direction

1.4.1 Purposes

Besides authorizing acquisition of the Preserve as a demonstration area for an experimental management regime, the Act identified purposes for the acquisition, three of which are directly tied to the management of the Preserve:

- to protect and preserve for future generations the scientific, scenic, historic, and natural values...including rivers and ecosystems, and archaeological, geological, and cultural resources;
- to provide opportunities for public recreation;
- to provide for sustained yield management of the Baca ranch for timber production and domestic livestock grazing insofar as is consistent with the other purposes stated herein.

1.4.2 Goals

In section 108, (d) the Act identified six goals for comprehensive management of the Preserve:

1. *operation of the Preserve as a working ranch, consistent with paragraphs (2) through (4);*
2. *the protection and preservation of the scientific, scenic, geologic, watershed, fish, wildlife, historic, cultural and recreational values of the Preserve;*
3. *multiple use and sustained yield of renewable resources within the Preserve;*
4. *public use and access to the Preserve for recreation;*
5. *renewable resource utilization and management alternatives that, to the extent practicable –*
 - A. *benefit local communities and small businesses;*
 - B. *enhance coordination of management objectives with those on surrounding National Forest System land; and*
 - C. *provide cost savings to the Trust through the exchange of services, including but not limited to labor and maintenance of facilities, for resources provided by the Trust; and*
6. *optimizing the generation of income based on existing market conditions, to the extent that it does not unreasonably diminish the long-term scenic and natural values of the area, or the multiple use and sustained yield capability of the land.*

1.4.3 Benchmarks

The Act identified several benchmarks to measure the progress of the Trust in meeting the goals and purposes of the Act.

Public Access

Within two years of acquisition, the Preserve was to be open for reasonable access by the public. This goal was met in 2002 with the initiation of interim programs for summer recreation, and winter recreation, which included hunting and special events. In 2002 the Trust hosted only 700 visitors to the Preserve; this number grew to over 12,000 in 2007 and 15,000 in 2008.

Comprehensive Management

Within two years of assuming management, the Trust was to develop a program for the comprehensive management of the Preserve.

This benchmark was reached in August of 2003, with the Federal Register publication of the final NEPA procedures for the Trust. The purpose of these procedures is, “To implement the comprehensive management of the lands, resources, and facilities of the Valles Caldera National Preserve...” and included ten management principles to describe the values of the Trust and the vision adopted by the trustees.

Comprehensive management of the Preserve, under the Trust’s NEPA procedures, is a dynamic system of planning, implementation, monitoring, evaluating, and adjusting actions on the ground towards ultimate goal attainment. The process is documented in Stewardship Registers and the State of the Preserve, which is published every five years.

Plan for Decreasing Appropriated Funding

Also, within two years of assuming management the Trust was to provide to Congress a plan that will achieve at a minimum, the financially self sustained operation of the Trust and management of the Preserve within 15 full years of acquisition.

A plan for decreasing appropriations was completed by the trustees in November of 2004 and included in Appendix B of the “Framework and Strategic Guidance for Comprehensive Management” prepared by the trustees and distributed by the Trust in 2005. Besides an introduction and background information the plan addressed decreasing appropriations and identified a development strategy for the Preserve which identified three phases of development:

- Phase 1: Institution Building – Approximately 2001-2005
- Phase 2: Infrastructure Development – Approximately 2005-2010
- Phase 3: Program Refinement – Approximately 2010-2015

The development strategy also identified several sources of funding for achieving financial self-sufficiency including:

- Fees for public access or activities,
- Federal and other public grants,
- Sustainable utilization of natural resources,
- Private fund-raising and partnerships,
- Retail and merchandizing activities,
- Nonprogrammed special events, and
- Hospitality activities.

The plan also noted how performance would be tracked but did not project actual costs or revenues.

Financial Self-sufficiency

The term “financially self-sustaining” is defined in the act as meaning “*management and operating expenditures equal to or less than proceeds derived from fees and other receipts from resource use and development and interest on invested funds.*” The Act further clarifies that, “*Management and operating expenditures shall include trustee expenses, salaries and benefits of staff, administrative and operating expenses, improvements to and maintenance of lands and facilities of the Preserve, and other similar expenses*”, in other words, all direct and indirect expenditures.

The goal for financial self-sufficiency is July 25, 2015; or fifteen full years after acquisition. If, after the fourteenth full year following acquisition, the trustees believe that goals and objectives of the comprehensive management program under section 108 (d) have been met, but the Trust has not achieved financial self-sufficiency as defined, the trustees may submit to the Committees of Congress, a recommendation for authorization of appropriations beyond that provided by the Act.

In FY 2008, the Trust recovered 18 percent of its management and operating expenditures through revenues and donations.



VALLES CALDERA NATIONAL PRESERVE, OFTEN REFERRED TO AS THE “CROWN JEWEL” OF THE JEMEZ MOUNTAINS.

FROM THE LEFT: OLD GROWTH PINE STAND SURROUNDING THE HISTORIC RANCH HEADQUARTERS, VIEW FROM THE NORTHERN RIM, EAST FORK OF THE JEMEZ RIVER MEANDERING THROUGH HIDDEN VALLEY.

Section - 2 Fiscal Year 2008 Goal Attainment

The FY 2007 Report to Congress put forward an ambitious scope of work for FY 2008; establishing seven goals for attainment.

Three of the goals were administrative, dealing with elements of finance and budget management. Three of the goals were directed towards continuing our progress in moving from interim to comprehensive management. The seventh goal focused on increasing the revenues and visitation under the current interim recreation program. The following briefly describes the status of the goals for FY 2008 identified in the Report to Congress submitted for Fiscal Year 2007.

2.1 Administrative Goals

2.1.1 Develop a Strategic Business Plan to Guide the Trust to Financial Self-sufficiency

Objective

To create a business plan that identifies options to generate revenues from programs, activities and commercial uses that equal or exceed operational expenses. The direction provided to the contractor was to explore alternatives which could generate approximately \$5,000,000 per year (in 2007 dollars) for the Trust to become financially self-sufficient by 2015.

Status

In March, 2008 the Trust awarded a contract to a commercial firm, Entrix Inc. to prepare the strategic business plan. The award was competitive; Entrix was selected from 11 applicants who submitted proposals to the Trust. The award was in the amount of \$174,841 and was based on “best value” considering the cost, experience, and technical approach of the applicant. The due date for submission of the plan was September, 2008. The plan was submitted as a draft for review and comment by the board and staff. The final document was delivered to the Board on December 31, 2008. This document is currently being reviewed and will be made available at a later date.

Narrative

The end product will provide information and alternatives as the Trust continues planning for public access and use on the Preserve. The scope of work addresses the sources of revenue identified in the 2004 plan for decreasing appropriations, emphasizing some specific avenues within those general categories.

2.1.2 Complete Financial Audit for Fiscal Years 2004 through 2007

Objective

Complete a comprehensive audit for fiscal years 2004 through 2007 of the Trust’s financial statements.

Status

The Trust developed a Request for Proposals (RFP) and the contract was awarded to Moss Adams, LLP in the amount of \$146,033.74. The Forest Service's Albuquerque Service Center –Budget & Finance Staff have cooperated with the Trust to provide documentation requested by Moss Adams. The report will be available by January 31, 2009. Moss Adams has been awarded the contract to audit the FY 2008 financial statement. Anticipated completion date for the FY 2008 audit is March 31, 2009.

Narrative

In prior years the Trust sought the most efficient accounting system for implementing its purposes, and transitioned between the Department of Agriculture (Forest Service) and the Department of Interior (National Business Center) and back to the Department of Agriculture (Forest Service) financial systems. These changes resulted in complications in completing the audit. In FY 2008, the Trust entered into an agreement with the Forest Service for financial services. The Forest Service system has proven to be the most reliable and efficient for the Trust. Completing the financial statement audit was a requirement of the a GAO review and will permit annual audits in accordance with the Government Corporation Control Act, U.S.C. title 31, 9105, as required by the Valles Caldera Preservation Act.

2.1.3 Develop Procurement Policy

Objective

Ensure that procedures applicable to the Trust's procurement of goods and services, including the award of contracts, fosters commercially reasonable buying practices and reasonable competition.

Status

In June 2008, Acting Executive Director, Lucia Turner, provided the Board with documentation that reflected the approval of the Valles Caldera Trust's Procurement Policy. The policy was approved on August 16, 2001. The policy was reviewed by the Office of Management and Budget (OMB) as required by the Act. Since this documentation is on file and the Trust has been using this procurement policy since the date it was approved, the Board determined that there was no need to revise the policy.

Narrative

The Valles Caldera Preservation Act exempts the Trust from federal procurement laws but requires that internal procurement policies be developed in consultation with the Office of Management and Budget (OMB). Such a procurement policy was developed by the Trust in 2001. The goal for 2008 was to develop a procurement policy that was more specific to the Trust and provided greater efficiencies. Since the Trust relies on the USFS for procurement and contracting support and submits payments through the Federal Finance System there remains far less flexibility than the law implies. The Trust is not exempt from federal appropriations law.

Based on a review of the 2001 procurement policy, the Trust determined in 2008 that a policy revision was not warranted at this time. In the future the Trust will work with OMB to ensure that procurement policies appropriately address our transition to complete financial self sufficiency.

2.2 Goals for Comprehensive Management

2.2.1 Complete Forage Management Environmental Assessment

Objective

Make decisions regarding the operation of the Preserve as a working ranch by continuing programs for domestic livestock grazing and managing the Preserve's ranch infrastructure consistent with the goals stated in the Valles Caldera Preservation Act.

Status

An Environmental Assessment (EA) was completed regarding the proposed *Multiple Use and Sustained Yield of Forage*. The EA was made available for a 45-day public comment period on December 19, 2008 (FY 2009). Based on a review of the EA and the public comments received the Executive Director will either make a Finding of No Significant Impact and prepare an implementing decision or, if no such finding can be made, may decide to prepare an Environmental Impact Statement, or to modify or terminate the action. The decision shall be made in the spring of 2009 following a public comment period on the findings.

Narrative

The Trust has proposed and analyzed the environmental effects of a comprehensive system to implement adaptive management for the allocation and use of forage by the Trust (mainly by livestock grazing). By focusing analysis and decisions on goal attainment as measured by objectives and monitored outcomes, the Trust increases flexibility in program management. The paradigm in public land management is that analysis and decisions focus on a specific action or activity. While public land managers embrace the concept of adaptive management, they often lack the necessary data and monitoring system to efficiently implement the more flexible system of management. The Trust has invested in data, acquiring systematically by or under the supervision of experts and systematically managed in a data base and Geographic Information System (GIS). These data allow the Trust to define a baseline and establish quantifiable goals, objectives, and monitored outcomes. Decisions focus on a variety of activities that can occur in time and space provided that objectives are being met.

This systematic approach can greatly increase the transparency of planning and decision-making and has even allowed the Trust to include the public in monitoring activities. The system, which thus far has been developed in support of managing range and livestock, will be integrated with future natural resource planning efforts including the management of forestry and fire. By creating a system designed to integrate new information and changing conditions, future cost and time requirements associated with planning should be significantly reduced.

The outcome will be a comprehensive program for the multiple use and sustained yield of the Preserve's forage resources consistent with the Multiple Use and Sustained Yield Act of 1960.

2.2.2 Finalize Programmatic Agreement with New Mexico State Historic Preservation Office and Advisory Council on Historic Preservation

Objective

Formalize the guidelines and procedures for preservation of cultural resources on the Preserve in accordance with the National Historic Preservation Act (NHPA) and in consultation with the New Mexico State Historic Preservation Office (SHPO) and with Native American tribes and pueblos associated with the Valles Caldera.

Status

As the result of multiple years of consultation, in FY 2008 the Trust, the Advisory Council on Historic Preservation (ACHP), and New Mexico SHPO drafted a Programmatic Agreement (PA) for compliance with Section 106 of NHPA. The draft is currently under review by SHPO. Once SHPO's comments are incorporated and their concurrence received, it will be presented to the Board. Once approved it will be presented to Tribes and Pueblos to solicit comments and invite them to become signatories, and to the public for their comments.

Narrative

As a federal land management agency, the Trust is responsible under the National Historic Preservation Act for protecting historic, archaeological, architectural and ethnographic resources and landscapes; for building knowledge about this historic heritage; and for consulting with Native American Tribes and Pueblos that attach religious and cultural significance to the resources and landscapes of the Preserve. The Trust is committed to achieving these preservation goals effectively and efficiently, and with respect for and in cooperation with concerned Tribes and Pueblos. The PA will formalize procedures already in place at the Preserve. The PA is of short duration (i.e., less than five years), and will be augmented or replaced with a cultural resources management plan (CRMP) within that time frame.

As the result of multiple years of consultation, the Trust has reached agreement with the ACHP and New Mexico SHPO in drafting a PA for compliance with Section 106 of NHPA. When final edits are completed and the Board of Trustees approves the final draft, the Trust will send the PA to Tribes and Pueblos to solicit comments and to invite them to become signatories, and to the public for their comments. An estimated date for the final PA is March 2009.

2.2.3 Begin Long-term Planning for Public Access and Use

Objective

Continue planning to transition from an interim recreation program to a long-term program to meet the purposes identified in the Act and to address the desire of the public to have broader use and access to the Preserve for recreation, education and other purposes.

Status

Phase I of the Public Access and Use Planning Project was initiated in December 2006. This phase focused on acquiring data and information and included holding a series of public workshops and strategic business planning described previously. The Trust has assembled a team to begin the development of alternatives for public access and use of the Preserve.

Narrative

The Trust has engaged a USDA-Forest Service Enterprise Team (which includes engineers, a landscape architect, transportation planner, and an expert in innovative recreation planning). An independent project manager contracted through Strategy Works, Inc. is responsible for ensuring the project completion is timely and according to Trust policies, procedures, and guidelines.

Using the results from the public workshop series held in 2007 and the strategic business planning and analysis completed in 2008, this team will work with the Trust to develop of a reasonable range of alternatives for the development of programs, facilities, and infrastructure to support access and use of the Preserve for recreation, education, science and research and other purposes. This next phase will include planning and decision-making under the requirements of NEPA. The development of long term plans for public access and use which include facilities and transportation systems will require the preparation of an Environmental Impact Statement and collaborative involvement by stakeholders. Planning is expected to be complete in the final quarter of FY 2010. An updated planning schedule will be included in the Report to Congress for the FY 2009.

2.3 Implement New Recreation Programs

2.3.1 Expanding Summer Recreation Programs and Activities

Objective

Expand recreational opportunities under the interim program to increase overall visitation and encourage repeat visitation, increase revenue generation from visitation and retail sales, and gather information contributing to comprehensive planning.

Status

Several new programs and opportunities for public access and recreation were added during 2008 spring-fall season.

Narrative

The Trust has been operating an interim program for public use and access since 2002. The program offers backcountry (undeveloped) day use activities including fishing, hiking, van tours, as well as hunting and a variety of special events. Because there are no permanent facilities (visitor facilities, parking, restrooms, or other amenities) the Trust has used a combination of reservations and lottery systems to manage access. Prior to this year, visitors driving into the Preserve without prior arrangements had limited opportunity to enjoy recreation activities beyond two short hikes available from NM 4. Based on public feedback and continued growth and demand, the Trust expanded the variety of interpretive programs and adventures.

This year the Preserve was open seven days a week during the summer recreation season. Besides the new interpretive programs, visitors enjoyed short hikes and van tours daily, without a prior reservation. The Trust also added evening fishing to the fishing lottery, fishing opportunities on a first come first served basis, and regular opportunities for mountain bike riding. In addition, the Trust provided visitor information services and opened a small gift shop at its Jemez Springs administrative site. This facility, staffed largely with volunteers in 2008, is scheduled to be open with regular winter and summer hours and full time staffing in 2009.

In FY 2008 visitation to the Preserve increased by 23 percent from FY 2007 (from 12,405 visitor days 15,238). With limited hours of operation and services, nearly 3,000 visitors were served at the Jemez Springs facility. In FY 2009 with full time hours of operation we expect the number of visitors served at the Jemez Springs visitor information facility to increase. Visitors served at Jemez Springs may go on to visit the Preserve, make reservations to visit at a later time, and purchase merchandise. In 2009 we hope to implement tracking to better understand how this facility serves visitors and enhance potential as a gateway to visiting the Preserve.

While the Trust met this annual goal to expand opportunities to visitors, we remain limited by the existing turn of the century ranch facilities and infrastructure on the Preserve. Significant increases in visitation will need to be supported by investments in existing facilities and infrastructure as well as new facilities and transportation systems. Development will be considered in detail in the public access and use plan and could require capital investments.



FIGURE 3 – JEMEZ SPRINGS VISITOR CENTER AND GIFT SHOP

Section - 3 Organization, Program Accomplishments, and Budget

This section highlights the FY 2008 organization and budget for the Trust and major activities and accomplishments under each budget item.

3.1 Organization

The staff at the Trust consists of 12 permanent full time employees. Six employees work less than full time or are employed for a limited term. In addition, the Trust employs an average of 30 temporary employees during the summer field season and 10 during the winter.

3.1.1 Incoming Employees

Information Technology Assistant, Darren Toya (December 2007)

Recreation Supervisor, Marc Jarvis, (January 2008) previously employed with the civilian workforce, Department of Defense.

Information Technology Manager, William Breedlove III, (March 2008) previously employed with the civilian workforce, Department of Defense, Fort Meade, Maryland

Recreation Supervisor, Kimberly DeVall (July 2008) previously employed with the USDA Forest Service where she served as the Environmental Education Coordinator for the Santa Fe National Forest.

Ranch Foreman, Tim Haarmann (August 2008) transferred in from the Public Service Company of New Mexico, where he had served in the Environmental Department.

3.1.2 Outgoing Employees

The Executive Director for the Trust, Dr. Jeffrey Cross (April, 2006 – June, 2008), accepted a position with the National Park Service in Fort Collins, CO.

The Trust's Administrative Officer, Debbie Boggess (September 2006 – September 2008) accepted a position with the USDA Forest Service in Portland, OR.

Recreation Supervisor, Marc Jarvis, (January 2008 – June 2008) accepted a position in the civilian workforce with the Department of Defense in Germany.

3.1.3 Details, Special Assignments

Lucia Turner served as the Acting Executive Director from June, 2008 following the departure of Dr. Cross. Lucia recently retired after 42 years with the USDA. Lucia most recently served as the Deputy Regional Forester for the USDA Forest Service Southwestern Region in Albuquerque, New Mexico. Lucia will assist in the transition of the new Executive Director, Gary Bratcher, in January 2009.

3.1.4 Organization – (as of January 15, 2009)

Executive Director, Gary Bratcher (effective 1/04/2009)

Administration

Administrative Officer, Dennis Rino (effective 11/09/08)

IT, Will Breedlove
IT Assistant, Darren Toya
Human Resources, Pam Dale
Purchasing Specialist, Berta Pantoja
Information Specialist, Kim Toribio
Custodial Services, Liz Schulman

Planning and Operations

Preserve Manager, Dennis Trujillo

Natural Resources Coordinator, Marie Rodriguez
GIS Coordinator, John Swigart
Seasonal Cartographic Crew (2)
Ranch Foreman, Tim Haarmann, PhD
Facilities and Maintenance, Lonnie Strain
Seasonal Ranch Crew (3)
Outdoor Recreation Planner, Rob Dixon
Retail Sales and Facilities Rentals (2)
Supervisory Recreation Specialist, Kimberly DeVall
Seasonal Interpretive Specialist (1)
Seasonal Recreation Assistant (15)
Hunt Coordinator, Mick Trujillo
Landscape Architect/Assistant Recreation Coordinator, Rourke Mc Dermott

Research, Inventory and Monitoring

Preserve Scientist, Robert Parmenter, PhD

Biological Science Technician, Zoe Anna Duran
Research Assistant (Wildlife), Suzanne Gifford
Seasonal Biological Field Technician (6)
Acting Cultural Resource Coordinator, Ana Steffen, PhD
Archaeologist, William Barfuss
Archaeological Crew Chief, Jeremy Decker
Seasonal Archaeological Crew (4)

3.2 Program Activities and Accomplishments

The following section provides brief narratives of the activities and major accomplishments of the Trust in FY 2008. Activities and accomplishments are organized under Programs as identified in the program budget which follows in 3.3. Appendix B contains tables of measured outputs.

3.2.1 Administration

This budget item includes salaries for the Executive Director; salaries of staff for information technology (IT), budget and procurement, human resources, reception services; support of the safety and wellness program; all costs associated with the lease and upkeep of the Jemez Springs administrative facilities; and costs associated with the Board of Trustees including salary for the Chair, travel, per diem, and costs associated with board meetings and events.

Board of Trustees

The Act requires that the Board of Trustees hold at least three public meetings per year. In FY 2008 meetings were held quarterly. Agenda items for the public meetings include reports by the executive team, budget summaries and updates on programs and activities. The Board also holds working meetings. Minutes are published on the Trust's website.

Budget

The annual budget of the Trust consists of current FY appropriations (1106), monies carried over from previous FY appropriations (Treasury Account 1106), and monies from the interest bearing account where revenues and donations are deposited (Treasury Account 5363). The Trust began using its interest bearing account to invest in revenue generating programs including merchandise and upgrading visitor facilities.

Information Technology

The Information Technology (IT) and Information Systems Management (ISM) staff has improved the overall efficiency of the Valles Caldera Trust by making progress in several key areas. The targets of improvement for the Information Technology staff were maturing infrastructure, enhancing security, expanding development, and expediting technical support.

The IT staff has improved the response time to incidents by increasing staff and dedicating a full time position to Help Desk support. This has greatly reduced downtime of the system and allowed for many improvements in the other areas.

The infrastructure for the Trust's ISM has undergone a complete upgrade. Our radio system providing field communication has also improved. The addition of extra staff has allowed the IT/ISM department to save money and improve on down time by moving preventative maintenance, installation, and repairs in house. The Trust's main operational server has been upgraded to Small Business Server 2003. This allowed for many collateral benefits; the site's data storage capacity has increased, the Trust now has an intranet for collaboration, and security has been improved.

To improve Information Security the trust has invested \$8,500 in software to automate reporting procedures for Federal Information Security Management Act (FISMA). The

software will handle reporting as well as install software to keep client machines compliant by centrally controlling updates. The Information Technology staff has also improved the reporting features of the email protection, backups, event logs, and usage.

The Information Technology staff has also begun development projects to help improve the efficiency of the workplace. Several applications have been developed to help maintain property, manage purchases, and maintain records for acquisitions. The intranet is also being utilized to facilitate collaboration and better communication.

Personnel

See 3.1 *Organization* on page 19 for details. The Trust welcomed two new members to the Executive Team, an Interim (acting) Executive Director and the Administrative Officer. In addition to these two positions the Executive Team includes the Preserve Manager and Preserve Scientist.

Fifty percent of the Trust's planned budget is for salary and benefits. Salary and benefits comprise at least 70% of most federal agency's budgets. The Board continues to emphasize the need to carefully manage fixed costs including salary and benefits. The permanent employee staff is kept to a minimum and temporary and seasonal employees are hired as needed.

Safety

The Trust's safety policy is a system of roles, responsibilities and activities to prevent or respond to work related accidents, injuries, and illnesses. The Trust has had one reported accident/injury in FY 2008 (field related knee injury).

The Trust partnered with the Forest Service to conduct a Safety and Health Review of the office facility and the facilities on the Preserve. Discrepancies were noted that varied from routine clean up in and around office to concerns regarding disease that may occur as a result of rodents living in the facilities on the Preserve. The rodent population and associated risks have been one of the barriers to public and employee use of the Preserve's facilities. The deferred maintenance needs as identified in the 2006 facilities assessment (USFS Gila NF, Engineering Department, 2006) would largely address this issue.

This fiscal year the Trust integrated a wellness component into our safety policy. The objective of the wellness program is to reduce work related injuries, absence due to illness, stress and to improve productivity. The program includes matching time for exercise, Trust provided exercise equipment, time and funding allowed for information sharing and wellness education programs and activities.

Working with the Santa Fe National Forest we were able to meet compliance with Executive Order 13423, Environmental Management Systems. The USFS, Santa Fe National Forest has provided expertise in developing training programs and the USFS, Southwestern Regional Office and USFS Office of the Chief Information Office provided an employee to inspect facilities.

Liability Insurance

The Trust does not have access to the permanent judgment appropriation provided under section 1304 of title 31, U.S.C. (The Judgment Fund), for a claim, judgment or settlement. Therefore the Trust must acquire liability insurance through a private/commercial source. In FY 2007, the Trust purchased insurance through Colorado Casualty to cover liability, vehicles and volunteers for a total cost of \$40,878.

In FY 2008, Colorado Casualty declined to renew our general liability. Several providers were solicited for general liability insurance but all declined to cover the Trust. There simply was no accepted model or formula to quantify the risks associated with multiple use activities on public land.

The Trust was finally able to acquire liability insurance with a yearly aggregate coverage of \$2 million and \$1 million per claim and \$15,000 for automobile liability through a specialist insurance wholesaler, ADCO General, based in Denver, Colorado. The Trust has acquired liability insurance through May 2009 for a total cost of \$83,800; a 105 percent increase over the 2007 premium. There is concern that there will be another increase in the premium when the policy is due for renewal or that renewal could again be declined. Failure to secure liability insurance would lead to the termination of all public access and use of the Preserve.

3.2.2 Community Services

This budgetary function represents the Trust's participation in community activities and services. Trust staff, often during evenings and weekends, collaborates with schools, organizations and agencies to advance learning and collaboration through field trips, presentations, and participation on committees and organizations. In 2008 the Trust collaborated with the "Catch a Dream" Foundation to provide a memorable outdoor experience to a terminally ill young person.

The Trust is becoming recognized for its value as an educational landscape and the unique commitment and enthusiasm of the staff in engaging in "inspiration and learning". Support for this use has been universal; public workshops overwhelmingly identified this use as a priority. The commitment to using the Preserve for inspiration and learning is reflected in one of the management principles adopted by the trustees in 2001, "*Recognizing the great potential of the Preserve for learning and inspiration, we will strive to integrate opportunities for research, reflection and education in the programs of the Preserve.*"

Education

A number of K-12 schools as well as colleges and universities bring student and teachers to engage in on site learning. In FY 2008 we served 29 groups totaling nearly 600 individuals. Groups are accommodated on a case by case basis. Examples include:

- Faculty and students from Colorado College as they completed their annual "State of the Rockies" report.

- High school science teachers from northern New Mexico public schools participated in lessons on climate change, biodiversity, watershed dynamics and how to teach these topics to students at their respective schools.
- The Trust also hosted three science camps for middle- and high-school students, including one for students from the Eight Northern Pueblos. Numerous other educational groups (from middle school through university) visited the Preserve on science field trips.
- Pajarito Environmental Education Center (PEEC) brought Middle School students onto the Preserve to begin a multi-year interdisciplinary learning adventure. The students established monitoring plots and conducted forest inventory in an area proposed for forest thinning. Subsequent classes will return to the same area to continue photo and inventory monitoring. These data will be used in project planning and analysis.
- The University of New Mexico (UNM) held their 2008 southwestern archaeological field school on the Preserve. This five-week program for undergraduates provided 90 acres of high-quality inventory essential for preservation planning for opening new areas to fishing programs. The project also included limited testing at small rockshelters on Cerro la Jara to aid in decision-making for protection of the prehistoric sites and to learn more about occupation of the caldera during the Archaic period (5500 B.C. to A.D. 600). A second year is planned for the project, and yearly collaboration on the field school is being pursued.

Agencies and Organizations

The Trust responds to requests by agencies and organizations to host field trips to further collaboration with the Trust. Eleven groups totaling just under 400 individuals were served in FY 2008. Examples this year included New Mexico State Forestry, the San Juan Basin Archaeological Society and the State Department even brought visiting Afghanistan Cultural Resource Specialists to learn and share.

Outside Presentations

The Trust responds to a number of requests from schools, agencies, and organizations to provide speakers for meetings and events. In FY 2008 the Trust provided 10 outside presentations that reached over 500 individuals. A highlight this year was the Jemez Mountains Symposium on March 28th in Santa Fe. Bob Parmenter, the Trust's Chief Scientist organized presentations by 36 scientists on topics ranging from climate change impacts on northern New Mexico to management of fire, fisheries, wildlife, livestock, rangelands, forests, pest and beneficial insects, water quality, and wildlife diseases.

Collaboration

The Trust staff serves on a variety of collaborative groups which address local issues such as elk, development, recreation, wildland fire risk, water quality, and forest health. In total we are long term contributors/members in five such collaborative groups working with approximately 60 multi-agency partners.

Through its collaboration with the Jemez Watershed Group the Trust applied for and will receive in FY 2009, \$73,478 dollars in watershed restoration funding. The Trust is also

collaborating with the Santa Fe National Forest, New Mexico Highlands University, The Nature Conservancy and others to coordinate forest restoration activities in the Jemez Watershed, better positioning the Trust to receive grant funding through a variety of federal sources including the upcoming Forest Landscape Restoration Act. Trust staff participates on committees addressing issues including elk management (Seeking Common Ground), small wood utilization (Small Wood Opportunity Team), increasing education in science (EpSCOR), responding to emergencies, tourism (Scenic Byway Committee), and other local and regional issues.

3.2.3 Preserve Operations

This budget item includes salaries, contracts, and interagency agreements for law enforcement and fire protection and salaries and direct and indirect costs associated with the multiple use and sustained yield of natural resources.

Incident Management

The USFS Santa Fe National Forest provides incident management services for Law Enforcement and Fire Management. The Trust provides monies in cost share for these services which are implemented through Interagency Agreements.

Multiple Use and Sustained Yield

The Valles Caldera Trust manages for the multiple use and sustained yield of renewable resources including timber and forage. In FY 2008, the Trust ran the largest cattle operation since federal acquisition, with 1,960 yearlings grazing on the Preserve from June through September. The program returned \$58,172 to the Trust. This return included a bonus of \$3292 for a weight gain of more than 2.3 pounds per day.

During the grazing season, the steers were rotated on a regular basis between various pastures based on available forage and the grazing capacities that were determined earlier in the year. This was considered a high intensity management grazing strategy implemented in an attempt to minimize long-term ecological impacts. Weaknesses in the location and condition of this infrastructure (fences and water sources) became more apparent with the larger herd (more than double of previous years). Although, the increased number of cattle on the Preserve had an impact on the recreation program activities, the staff recognized the conflicts and management changes were identified to reduce the conflicts. Lessons learned from this experience and comments from the public will be used to develop an improved management system for grazing in 2009.

Besides providing revenue, the FY 2008 program also provided important information for completing the EA for the comprehensive plan for the Multiple Use and Sustained Yield of Forage. This information will be useful in moving forward with future grazing programs. The Trust will need to decide which type of livestock program and which grazing techniques will be most beneficial to the long-term sustainability of the goals and objectives of the Preserve.

Natural Resource Management

The emphasis in FY 2008 was on inventory and planning to move towards comprehensive management of natural resources. A small natural resource management project was completed by a group of volunteers organized by the New Mexico Wildlife Federation and Los Amigos de Valles Caldera. This project constructed ungulate (cattle/elk) barriers around populations of a rare bog birch found on the Preserve.

3.2.4 Infrastructure

This budget item includes the maintenance of the Preserve's infrastructure including perimeter fencing, open road network, and points of access; and facilities which include the buildings located on the Preserve

Infrastructure

A major accomplishment in this area was the reconstruction work was completed on the Valle Grande Entrance. This main point of access now meets all standards required by the New Mexico Department of Transportation (NMDOT) and the American Association of State Highway and Transportation Officials (AASHTO) based on current and expected level of use for the next 10 years.

In addition the Trust was able to complete 66 miles of road maintenance in FY 2008. This resulted in some level of maintenance occurring on the majority of the Preserve's open roads.

Facilities

Upgrades to the Casa de Baca Lodge continued in FY 2008. The renovations will increase the ability of the Trust to provide overnight accommodations and host special events.

In November 2008 the Trust accepted the final report for historic structures documentation (Dennison et al. 2007) for 18 buildings on the Preserve, including the early 20th century log cabins in the historic Ranch headquarters. The information will be used to aid management decisions in areas such as maintenance, use, modification, accessibility, and federal cultural resource compliance (NHPA). The report establishes priorities for preservation based on building significance, integrity, and level of deterioration. The report 1) assesses the physical condition of the buildings, 2) evaluates the buildings for National Register of Historic Places (NRHP) eligibility and 3) makes recommendations for repair and maintenance strategies to best preserve historic information and significance. The report indicates that repair and maintenance needs are extensive and will be costly. Historic structures require specialized skills and custom materials for maintenance and restoration to protect their historic integrity. Repair or replacement of foundations is the highest priority, as are repairs for substantial drainage and roofing problems, damaged or decaying logs, and rodent removal and control.

Currently, public access to and uses of the Preserve's existing facilities are limited. These facilities require deferred maintenance to address compliance with the Americans with Disabilities Act and public health and safety. Deferred maintenance identified in the 2006 facilities assessment (USFS Gila NF, Engineering Department, 2006) can proceed as guided

by the historic structures report. Four of the more modern facilities on the Preserve (the Casa de Baca Lodge, a bunkhouse and two A-Frames) would be very popular for public rental once these basic maintenance needs were addressed.

The Trust intends to seek out grants, use volunteers and other creative funding opportunities to maintain and repair our historic structures.

3.2.5 Recreation

The recreation programs represent 22 percent of the FY 2008 budget and 91 percent of the total revenue in 2008. The programs are divided into six budget codes: hunting, fishing, summer activities, winter activities, special events, concessions and facility rentals. The Trust is striving to provide quality recreational activities and experiences while preserving its natural and cultural values. One of the experiments in recreation is to take advantage of being able to close an area of the Preserve to all activities except a specific event on a specific date and then open it up to regular activities again the next day. This allows us to host unique, high quality, special events such as marathons and mountain bike rides, which can attract hundreds of visitors for a single day.

Over all this year visitor days increased to 15,238. This is a 23 percent increase over the FY 2007 total of 12,405. Revenue increased by five percent to \$584,000 in 2008. From May through September the Preserve was open seven days a week for the first time since being established. In the past, the Preserve operated five days a week during this peak season. One of the biggest challenges in recreation is marketing this landscape and the activities available to the public. Most public land agencies have had many decades to make themselves known nationally as well as internationally. The Preserve has been in existence for less than nine years and open to the public for only six years. Marketing the Preserve will continue to be a challenge in the foreseeable future. Being open seven days per week allows broader advertising without the risk that people will make the effort to visit only to find the gate closed.

Figure 4 depicts the locations of the recreation activities, staging areas and other landmarks referenced in the following narratives.

Hunting

- **Elk Hunting**

The Valles Caldera National Preserve is widely known for its excellent elk hunting. Hunters on the Preserve had a high level of success in the fall of 2008. The New Mexico Department of Game and Fish in cooperation with the Trust issued 77 bull tags for the Preserve; 75 hunters harvested 49 mature bulls for a 65 percent success rate. Ninety-five percent of bull hunters had an opportunity to harvest a legal bull elk (i.e. either missed or declined to take a shot). The state also issued 150 antlerless elk tags; 136 hunters harvested 54 antlerless elk for a 40 percent success rate. Overall, there were 211 hunters on the Preserve during 13 hunt weekends.

- **Turkey Hunting**

In 2008, the Trust offered its second wild turkey hunt since the property became public land. The Merriam's turkey was offered to the public on a fair chase basis and under low hunting pressure using a bow or shotgun. The Trust provided two programs in 2008 for hunting turkey. Both programs were open to the public and generated revenue for the Trust.

Deluxe Turkey Hunting Program

This "Deluxe Hunt Package" included three days of hunting, one day of scouting, four nights lodging and meals at the Casa de Baca Lodge. The hunters provided their own transportation. Seven hunting packages were sold for \$1,950 each and one was auctioned off at the Rocky Mountain Elk National Convention for \$2,450. Each hunter was allowed to bring one guest for additional \$600 for a potential increase in revenues of 30%.

Lottery Draw Program

The second program allowed the public to enter a lottery draw system for ten access authorizations and one access authorization was raffled off by the New Mexico Chapter of the National Wild Turkey Federation. The National Wild Turkey Federation held a raffle for one of the day access hunts at their annual banquet with 60 percent of the revenues collected returning to the Trust. The lottery cost \$20 per chance and included one day of scouting and three days of hunting on the Preserve. The hunters selected through the lottery and the one raffle winner were allowed day access only and were allowed one guest at no cost.

Both hunts had a bag limit of one turkey with a visible beard per hunter as stated in the New Mexico Big Game and Furbearer Rules and Information for Game Management Unit 6B.

All elk and turkey hunters received a welcome letter, orientation packet and an access agreement. For 2008, the Trust required a liability waiver to be signed by both elk and turkey hunters. Also, each hunter was required to attend an orientation session to learn the hunting rules and safety requirements. Volunteers from the Rocky Mountain Elk Foundation, National Wild Turkey Federation and other volunteers donated 1,156 hours to help hunters on the youth, mobility impaired and antlerless elk hunts and 122 hours on the turkey hunts. The Trust estimates the value of the volunteer hours as approximately \$20,000.

Hunters reported that the elk and turkey hunts were high quality and that they would like to return to hunt again. The Trust received letters of appreciation for the attention hunters received from staff, which added to their perception of the value of hunting on the Preserve. Elk hunts generated \$343,496 in revenues and cost approximately \$170,194 to market and conduct.

Turkey hunts generated \$25,280 in revenue and cost approximately \$8,800 to market and conduct. Over one-half of the costs associated with the turkey hunts were non-recurring, startup costs. Overall hunting generated \$368,776 in revenue.

Fishing

San Antonio Creek fishing (see Figure 4) was managed by a lottery system. In this lottery there are 950 slots and the winner of each slot may bring up to three guests. This adds up to a total capacity of 3,760 anglers for the year. There were 3,760 openings available for anglers on the San Antonio Creek and 1,747 were filled or 46 percent of the capacity available. Fishing opportunities on the Preserve were widely marketed.

Participation in the lottery has decreased from 6,309 tickets in 2005, to 3,902 tickets in 2008. The Trust believes that the decrease is a reflection on the popularity of the lottery system rather than a reduced demand for fishing. Therefore, the board determined that a change in the fishing program for 2009 should be considered.

In 2008, the fishing program on the San Antonio was impacted by the grazing program. The Trust will be revising its management strategy for the grazing program as well as the fishing programs on the Preserve for the 2009 program year.

A reservation based system on the East Fork of the Jemez River (see Figure 4) was piloted in 2008. This program allowed up to 10 people to fish the river per day. Anglers have the option to reserve a specific date or just show up to take advantage of any available slots on a first come first served basis. This pilot was successful and will be implemented as a regular program in 2009.

Summer Activities

Summer activities include van tours (wildlife, ecology, cultural, botany, history, etc.), guided and self-guided hikes, astronomy tours, equestrian trail riding, mountain biking, and tours for larger groups (schools, clubs, organizations, etc.). New to the program this year were a self guided hike around La Jara available with no reservations, a mountain bike trail riding program in the Banco Bonito area, one hour tours available seven days a week and our information center being open seven days a week. While many activities still require advance reservations or award through a lottery, this summer more activities were made available on a first come, first served basis. Free and open access to two hiking trails off NM 4 was made available in 2003 and these trails remain open and free to the public. These points of interest are depicted in Figure 4.

Many activities on the Preserve have not filled to capacity. Over time through marketing, infrastructure investment, advertising, and other formal and informal outreach methods, we expect a continued increase in visitation. We anticipate a marketing plan will be established once the Public Access and Use Planning effort has been completed.

Winter Activities

Visitation during the winter recreation season was about 36% of what could have been supported. Winter recreation on the Preserve offers unique events including skiing under a full or new (dark night) moon or simply skiing across the expanse of the Valle Grande. Horse drawn sleigh rides provide a very special experience. However, winter recreation faces challenges in cost containment, primarily clearing snow from the roads. Inconsistencies in

snowpack do not permit management through a reservation or lottery system, therefore the Trust must staff for maximum capacity throughout the season. There are no amenities or facilities that allow visitors to passively enjoy the Preserve during this season.

Special Events

In 2008, we continued with the marathon, mountain bike fun rides, fishing clinics, orienteering and art events. While the participation in these special events increased, we are not yet filling these events to capacity. These events continue to serve large numbers of people, provide quality experiences which generate positive feedback, are efficient in the ratio of staff time relative to visitors served, are a draw for volunteers, and generate local economic benefits. An investment in marketing is needed to initiate and promote visitation and generate a system for outreach and advertising.

One very successful experiment this year was the Art in the Caldera tours. Artists that participated in this event could paint, sketch, or even write or perform music or dance, inspired by the beauty and quiet of the Preserve. What makes this event so successful is the help from volunteers. We had dedicated volunteer artists who conducted these tours which kept our expenses down and provided a quality experience for the artists who participated in the tours. We hope use this as a model for other events in the future.

Retail Sales and Facility Rentals

Concession is the program area and budget item where retail sales and facility rentals are tracked. These activities are gaining momentum as sources of revenue generation. In FY 2008 the Trust invested money from the interest bearing account to upgrade facilities and purchase an updated product line for retail sales.

- **Retail Sales**

Merchandise is sold at our information centers including the portable buildings at the Valle Grande Staging Area and our newly opened facility at Jemez Springs. We welcome visitors and distribute information about the Preserve and our activities at these facilities. Out of our 15,000+ visitors this year, we served approximately 14,000 visitors out of less than 250 square feet at our Valle Grande Staging Area as pictured below on a typical summer day. There are no amenities such as modern restrooms, electricity, or potable water at this site. We served an additional 3,000 visitors¹ at our new Jemez Springs location this year.

One challenge with our limited retail space is the ability to display and store retail inventory. We updated our product line and completed a distinctive two-sided Preserve guide and visitor map for public distribution. The guide (included with this report) highlights the natural and cultural histories of the Preserve, as well as the scientific studies which are the foundation of adaptive management on the Preserve. The map depicts points of interest such as movie sets, scientific monitoring stations and trailheads on a colorful backdrop of terrain and vegetation. This guide and map provide visitors with a beautiful, durable and comprehensive information

¹ Visitors to the Jemez Springs facility are NOT counted as visitors to the Preserve unless and until they enter the Preserve.

source on the Preserves rich resources and opportunities. The guide, along with the updated product line, establishes a brand for the Preserve as a unique and scenic landscape and a fascinating experiment in public land management.

We also implemented our new collection officer policy, and installed cash registers at all three of our information center/retail locations. The procedures required to implement this policy have helped us improve our detailed record keeping related to retail sales.

In FY 2008 merchandise sales increased this year by 29 percent from FY 2007 to \$54,743. Our information centers not only provide information and sell merchandise, but we also process fees for other recreation activities on site. This gives the visitor the option to make a reservation in advance on the web or reserve their activity on site. We processed another \$138,513 in fees for recreation activities through these information centers.



VALLES GRANDE STAGING AREA

- **Facility Rentals**

The two facilities on the Preserve that can provide some level of accommodations are the Casa de Baca Lodge and the Bunkhouse. In addition to deferred maintenance to address general maintenance and standards for construction, health and safety upgrades were required to permit public lodging and food service. We have now installed new non-permeable, anti microbial, smooth surface counter tops at the Casa de Baca lodge to accommodate food preparation and servicing for catered events and activities. We have also upgraded the lodge's antiquated heating system by removing old hazardous and ineffective wall heaters and replacing them with efficient baseboard hot water heaters. In FY2009 we hope to have our waste water and drinking water systems permitted to allow us to accommodate larger groups. In addition we are continuing with renovations to be compliant with ADA standards.

These facilities are group facilities with shared bathrooms and are only rented to a group, which limits the effective capacity. In FY 2008 we accommodated 1,078 visitor nights. Visitors included commercial filming crews, wedding parties, special event participants as well as administrative use by the Board of Trustees for retreats and meetings.

We hosted an open house to promote and market our hospitality and facility rental opportunities. We hope this leads to an increase in use in 2009.

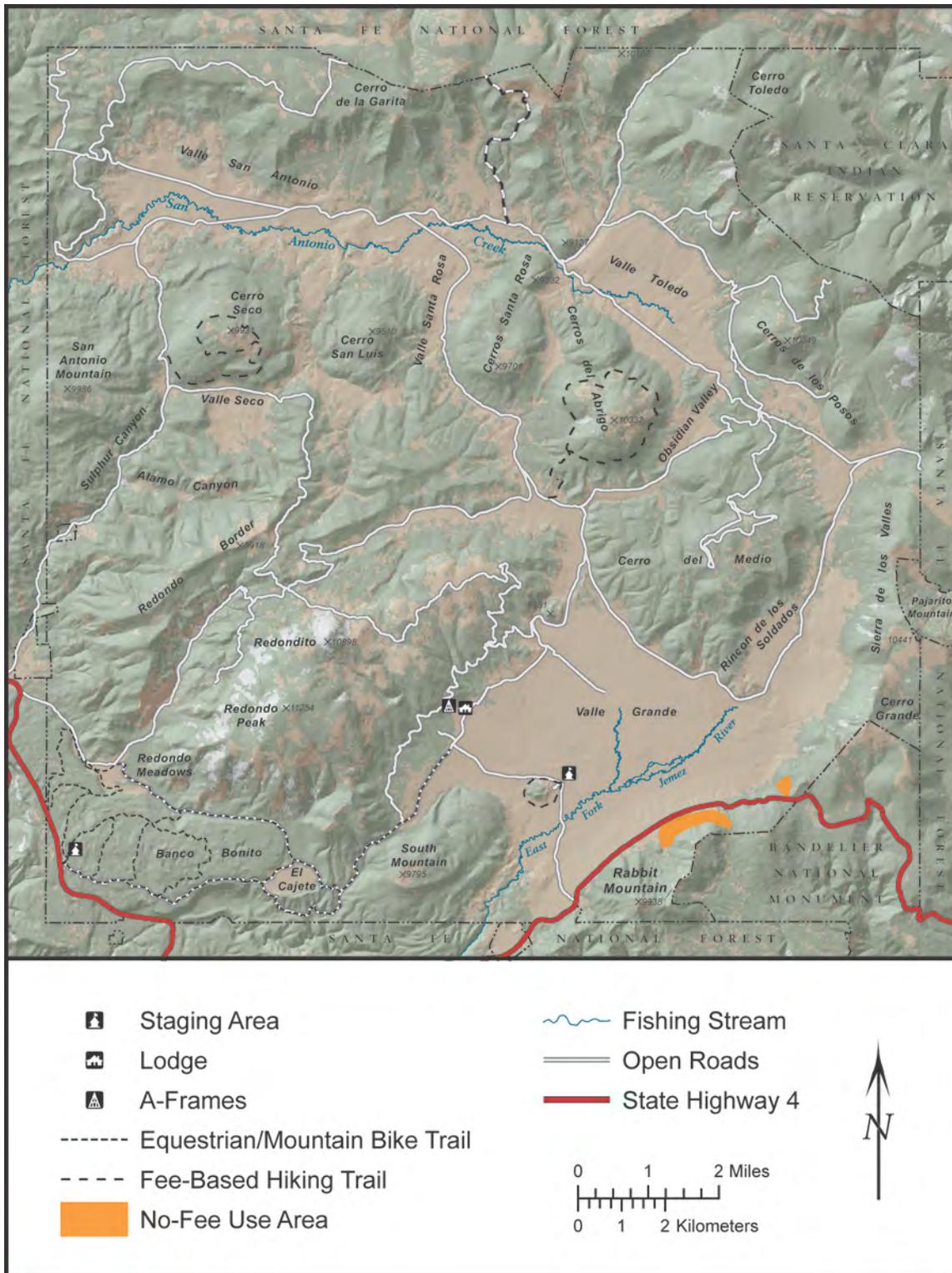


FIGURE 4 – REFERENCE LOCATIONS FOR RECREATION ACTIVITIES

3.2.6 Planning

Work under this budget item includes strategic planning under the Government Performance and Results Act, planning for stewardship actions under the National Environmental Policy Act, and administrative and business planning specific to the Trust.

Administrative

- **Strategic Business Plan (see Section Two, Goal Attainment)**

Natural Resource Management (NARM),

- **Watershed**

The NEPA process was initiated for the restoration of wetlands and riparian systems within the northern and western watersheds on the Preserve. The estimated date for a decision is March 2009. The inventory work was funded through a grant received by Los Amigos. Implementation funding (through grants) has already been committed to the Trust and Los Amigos to support restoration activities when planning work is complete.

- **Forest and Grassland**

Inventory and analysis was initiated in the *Redondo Canyon* area along the Preserve's western boundary. The Trust is considering thinning and the use of prescribed fire to reduce wildfire risk and improve forest health. The NEPA process will be initiated in 2009. A proposal was submitted to the National Forest Foundation to receive funding for implementation activities.

Multiple Use and Sustained Yield (MUSY)

- **Forage**

See Section 2 – *Goal Attainment*

Public Use and Access

- **Comprehensive Planning Public Use and Access**

See Section 2 – *Goal Attainment*

3.2.7 Science

The Trust's Science program consists primarily of programs for inventory, monitoring and research related to natural and cultural resources and socio-economic conditions and is supported by 16 percent of the Trust's planned budget. The Trust's robust science program has provided the necessary foundation for "Science Based Adaptive Management" as described in the agencies Management Principles.

Science also contributes to community services, education and recreation programs on the Preserve. The Cultural Resource program in particular has contributed to revenue generation on the Preserve by developing public tours and special events. For example, the Cultural resources program collaborated with the Pueblo of Jemez to create a tour which features a Tribal Council member, Paul Tosa, providing visitors with the history of the Jemez people, especially their

connection to the Preserve's landscape. The program was managed as a recreational event, with logistics and implementation managed through the recreation staff.

Another example includes Trust archaeologists guiding visitors in van tours that include sites of significant prehistoric and historic use and demonstrations of prehistoric skills such as stone tool making and throwing darts with an atlatl. Tours on geology, botany and other education themes are also well received. These types of "eco-tours" have received positive feedback from participants and we hope to continue and expand them in the future.

Fiscal year accomplishments in the areas of inventory, monitoring and research are summarized below.

Inventory

- **Forests**

Stratified inventory of the Preserve's forests was completed and all data have been entered into the National Resource Inventory System used nation-wide by the Forest Service, and are available to use for planning and analysis. Stratified, preserve-wide approach reduced the number of inventory plots required and associated cost by 70-90 percent with a total cost of about \$50,000. Individual tree data, ground surface and vegetation inventory will support the use of natural resource models including wildland fire ignition and spread, timber growth and volume, insect and erosion risks, and resource response to management actions.

All data have been collected in a manner compatible with the Natural Resource Inventory System used by the USFS. All data are associated and managed in a corporate GIS that will greatly increase its usefulness in planning and reduce time and costs associated with forest and fire planning. There are few public land units that have this type of data available on large landscapes let alone on an entire administrative unit. Some have used analysis to populate areas not inventoried; however, if the original inventory is not designed for that purpose the results are usually not statistically accurate.

Preserve-wide, spatially delineated data will allow the Trust to make Preserve-wide decisions on forest and fire management. Normally, multiple analyses and decisions are required to meet the standards for site specific analysis, again demonstrating further cost savings and efficiencies.

- **Roads**

Remote imagery indicated approximately 1800 miles of road existed on the Preserve. Major roads accessing the valles and various points of external access had been constructed from about 1935-1960. These roads were used in support of ranching and early logging when the Preserve was under private ownership. In the 1960's road networks were carved from the forested mountains of the Preserve in a spiral pattern. This dense road network was used to facilitate aggressive clear-cutting for just over a decade. Since the 1970's very little road construction has occurred and since federal acquisition the Trust has focused on the

inventory, maintenance and upgrade of the existing road network as well as closing many roads.

The Trust prioritized inventory and maintenance of the major access roads which was complete by 2005. The inventory of the “spaghetti” network of forested roads has been ongoing in a systematic fashion to inform transportation planning on the Preserve for access, use and resource management.

The inventory has been collected in a manner to be compatible with USFS databases for the management of infrastructure. This system is designed to facilitate efficient long term management of roads and their features. In addition it permits accurate modeling associated with costs over time and effects to resources including soil and water quality.

- **Geology and Soils**

Major inventory projects on the geology and soils resources of the Preserve neared completion in 2008. The geology inventory “quad sheet” maps were completed, and a composite map and GIS data layer is scheduled for completion in 2009. The final product will be available for public distribution. A Preserve-wide soil inventory (Terrestrial Ecosystem Survey) was also complete in FY 2008. This is a standardized inventory completed by the USDA’s Forest Service and National Resource Conservation Service. Final products will include a map, data base and Geographic Information System data available to the Trust, as well in the public domain. These final products are expected to be available in FY 2009.

- **Cultural Resources Program**

In FY 2008, Cultural resource surveys were completed on 960 acres. Staff archaeologists surveyed 745 acres in support of project planning and NHPA Section 106 compliance. The remaining 215 acres were surveyed in support of NHPA Section 110 knowledge-building and pre-planning goals.

Field activities included the documentation of sites discovered through survey, and revisits to and evaluation of known sites. A total of 53 new prehistoric and historic sites were documented, including large and small “lithic scatters” and several rockshelters and fieldhouses. One rockshelter on Cerro Santa Rosa had 4 to 5 types of decorated pottery reflecting its use by various peoples over time.

New in 2008 is the initiation of a volunteer effort to locate and document carvings on aspen trees (aka “dendroglyphs”) across the Preserve. These carvings were created by sheep herders and cowboys over the last two centuries. While many kinds of cultural resources survey are difficult to coordinate with volunteers due to the high level of technical skills required, identification of aspen carvings and documentation of GPS location is very suitable for volunteer survey. During this pilot year for the program, a group of 14 dedicated volunteers recorded about 100 carvings, including markings from the early 1900’s and artwork such as horses, people, and crosses. This nascent program will be continued in 2009 and beyond, and

results will be helpful in understanding 20th century uses of the area and in preserving the information contained in this very fragile cultural resource.

- **Social Science Survey**

An inventory of public attitudes on various natural and socio-economic issues within the socioeconomic area surrounding the Preserve is being completed through a survey conducted by social scientists working for the USDA Forest Service, Rocky Mountain Research Station. The survey is focusing primarily in Sandoval and Rio Arriba counties and seeks to quantify the perceptions, opinions, needs and desires of individuals who are most likely to be economically affected by decisions on public lands.

Monitoring

In FY 2008, the Trust continued annual monitoring projects for rangeland forage production and utilization, forest ecosystem changes following thinning and mastication, plant and wildlife (terrestrial and aquatic) responses to prescribed fire, stream water quality, climate conditions, and elk and fish population dynamics (see Appendix B, Table 6) throughout the Preserve. In addition, new stream gauging stations and flumes were installed on the four major watersheds of the Preserve, so that future changes in water production to downstream villages, towns, Pueblos and cities as well as the ability of the watershed to capture and store water can be monitored; we anticipate that as the Trust restores the many stands of second-growth, high density forests, we will observe a concomitant increase in stream water flows to downstream communities, thereby enhancing the “ecosystem services” of the Preserve.

A systematic approach to monitoring has yielded opportunities in the past to incorporate volunteers and in FY2008 offer range monitoring as an “Eco-tourism” event in partnership with the Sierra Club.

The monitoring program relies on inventory to provide baseline data and a system of permanent and temporary monitoring sites to measure direct, indirect, and cumulative effects of programs and activities that occur on the Preserve.

Permanent monitoring sites, systematically established improve efficiencies in long term management. Permanent monitoring sites support monitoring of a multiple of activities and projects reducing the cost of monitoring and increasing the quality of evaluation. Systematic cumulative effects monitoring is rare on public lands. By establishing Preserve-wide monitoring sites, cumulative effects monitoring is ongoing with no additional investment. In addition, the quality of monitoring data is statistically superior when collected systematically.

- **Cultural Resources Program**

This year 69 sites were revisited to assess changes through time of known cultural resource sites. Intensive investigations or assessments were conducted at 2 rockshelter sites and an “open-air” site at Cerro la Jara, and at a 1930’s historic logging town in Redondo Meadows. In all 122 sites were visited this year, with artifacts and assemblages representing human use of

the caldera from the late Paleoindian period (as early as 7500 B.C.) through Ancestral Puebloan occupations (beginning around A.D. 800), and into the early 20th century.

Research

Research projects in the Preserve increased from 28 in 2007 to 32 projects in 2008, and addressed questions concerning topics such as climate change impacts on watershed hydrology, the spread of wildlife diseases, fire ecology, elk-predator interactions, carbon sequestration, biodiversity, and elk-livestock grazing. We also learned in October, 2008, that the New Mexico EPSCoR grant from NSF had been funded for \$3 million per year for 5 years, and the Preserve is one of the three field study sites for the project; the topic is to understand climate change on upland water resources in northern New Mexico. Project collaborators include all the New Mexico universities.

3.3 Budget

The planned budget, actual expenditures, and revenues are detailed in Table 1 below. The planned budget is displayed out by program area (as under 3.2) and spending category. Expenditures are displayed by program area and Treasury Code (1106 – Money appropriated through Congress; 5363 – Money from the Trusts interest bearing account). Revenues are displayed by program area.

In summary, the Trust began with planned expenditures of \$4,278,508. Actual expenditures equaled \$3,631,398. Contracts and agreements for large planning efforts are still being developed and these funds remain unobligated. Proposals are currently being reviewed.

The Trust continues to demonstrate efficiencies in fiscal management. Administrative costs including fixed costs for leasing and maintaining administrative offices, supplies and equipment; administrative staffing including the Executive Director and Administrative Officer; support staff including procurement human services, contracting, and information technology; costs for maintaining the Information Management Systems including, phones, computers and field communications; and support for salary, travel and training for the Board of Trustees accounts for only 27 percent of the Trust's annual planned budget. The second largest allocation at 22 percent goes towards providing programs for public access and use. The combined salary and benefits for all employees accounts for only 50 percent of the Trust's budget.

3.3.1 FY 2008 Budget Summary

TABLE 1 – SUMMARY OF PLANNED AND ACTUAL EXPENDITURES AS WELL AS REVENUES FOR FY 2008

FY 2008 Program	PLANNED EXPENDITURES							ACTUAL EXPENDITURES		PROGRAM REVENUES	
	Salary	Travel Training	Fleet	Contracts	Supplies Equip.	Totals	% Total	Expenditures 1106	Expenditures 5363	Revenue	% Total
Administration	\$666,228	\$53,250	\$6,576	\$301,996	\$118,069	\$1,146,119	27%	\$1,130,059	\$10,617	\$31,133	5%
Recreation							22%				
<i>Hunt</i>	\$62,166	\$15,000	\$8,942	\$72,625	\$9,644	\$168,377		\$179,714		\$368,776	53%
<i>Fish</i>	\$61,859		\$16,185	\$27,640	\$14,500	\$120,181		\$75,043		\$68,913	10%
<i>Summer</i>	\$362,892	\$16,225	\$28,973	\$64,240	\$9,700	\$482,030		\$431,167		\$45,811	7%
<i>Winter</i>	\$43,271			\$23,282	\$3,500	\$70,053		\$71,327		\$19,170	3%
<i>Special Events</i>	\$66,167			\$10,500	\$6,000	\$82,667		\$82,359	\$5,773	\$40,425	6%
<i>Retail/Facility</i>	\$6,844			\$5,000	\$5,000	\$16,844		\$20,935	\$37,725	\$90,758	13%
Science	\$301,292	\$12,600	\$30,886	\$269,369	\$59,303	\$673,450	16%	\$691,701	\$4,928		0%
Planning	\$80,060	\$2,500	\$4,290	\$519,579	\$8,100	\$614,529	14%	\$323,239			0%
Infrastructure	\$291,362	\$1,500	\$10,560	\$165,960	\$14,500	\$483,882	11%	\$211,134			0%
Operations	\$168,443	\$10,000	\$17,097	\$161,136	\$30,138	\$386,814	9%	\$396,068	\$323		
<i>Grazing</i> ²										\$26,584 ³	4%
Community Service	\$31,062	\$500			\$2,000	\$33,562	1%	\$18,652			0%
Total	\$2,141,643	\$111,575	\$123,509	\$1,621,327	\$280,454	\$4,278,508		\$3,631,398	\$59,366	\$691,570	
% Total	50%	3%	3%	38%	7%			98%	2%		

² Grazing expenditures are included in the Operations budget line item.

³ The grazing program generated \$58,172 in revenues. However, only \$26,584 was received in FY 2008. The final payment was received in FY 2009.



Don J. Usner

FIGURE 5 HISTORIC RANCH FEATURES IN THE VALLE GRANDE

3.3.2 Monetary and In-kind Contributions

The Preserve benefits from monetary as well as non-monetary contributions. Non-monetary contributions include time and expertise contributed by our many volunteers. Over \$1.6 million was invested in extramural education and research projects on the Preserve in 2008. Extramural funding refers to money invested in projects (mostly research, inventory and monitoring) conducted on the Preserve by an outside agency or organization. This funding comes to these organizations through a variety of sources including grants, government, or commercial sources. The science program generated 4231 hours (71 percent of the total) and over 1.6 million dollars in extramural investments in FY 2008. Work conducted on the Preserve by outside agencies and organizations as well as volunteers provides direct support to our program of work as well as increasing collaboration, improving the quality of our work, and providing transparency in the adaptive management process.

TABLE 2 - MONETARY AND IN-KIND CONTRIBUTIONS

Program	Monetary Contributions	Extramural Funding	Volunteer Hours
Administration	\$11,958		13
Science		\$1,628,882	4231
Recreation			
<i>Hunt</i>			130
<i>Fish</i>			
<i>Summer</i>			297
<i>Winter</i>			51
<i>Special Events</i>			276
<i>Retail/Facilities</i>			314
Operations			676
TOTALS	\$11,958	\$1,628,882	5974

The Board of Trustees is dedicated to the success of the Trust and ensuring that the Preserve is available to the public as outlined in the Act. Each member contributes many “unpaid” hours, participating in special events, working with staff, and responding to public inquiries.

Section - 4 Goals Fiscal Year 2009

4.1 Administrative

4.1.1 Define and expand program to solicit contributions and donations to the Trust.

Objective

The Valles Caldera Preservation Act empowers the Trust to “*solicit and accept donations of funds, property, supplies or services from individuals, foundations, corporations, and other private or public entities for the purposes of carrying out its duties*”. It is the intent of the Trust to develop an on-going program to target these entities in order to fund activities and infrastructure.

Metric

System/staff in place to implement annual program of work.

Narrative

In order for the Trust to maximize recreational programs, expand public access to the Preserve, and further develop revenue-generating activities, substantial investment in excess of current funds available will be necessary. Outside contributions and/or donations would greatly enhance the Trust’s ability to improve programs and activities. The Trust will be active in solicitation and in working with support organizations to access these outside funds.

4.1.2 Expand attendance and participation at public meetings of the Board of Trustees

Objective

Ensure participation by a broad spectrum of stakeholders

Metric

Number and affiliation of attendees

Narrative

Public board meetings are attended by a contingent of groups and individuals with an avid interest and passion for the management of the Preserve especially for access and recreation. The Board would like broader representation from stakeholders with interests in the environment, science, ranching, education, and other areas of interest and management concern.

4.2 Community Services

4.2.1 Support to Jemez Watershed Group

Objective

Support the update of the Jemez Watershed Restoration Action Strategy (WRAS), and website management.

Metric

Updated WRAS approved by the Environmental Protection Agency (EPA).

Narrative

An active watershed group and current WRAS are prerequisites to accessing EPA funds for on the ground watershed restoration projects. This year the Trust received just under \$80,000 in support of proposed watershed restoration activities in the San Antonio and Sulphur Creek watersheds in 2009-2011. Watershed groups are formed using EPA funds, however upon completion and approval of the original WRAS, responsibility returns to the Watershed group to remain active and keep the WRAS current.

4.3 Preserve Operations

4.3.1 Increase Forest Management Capacity

Objective

To increase the capacity of Trust to perform project level planning and implementation of forest and fire related projects.

Metric

System/staff in place to implement annual program of work.

Narrative

The Natural Resource Program has one permanent full time person and no seasonal or temporary employees. Contractors are used effectively to support comprehensive planning and the planning and implementation of small projects. However, we need to develop the capacity to initiate a strong annual work program as comprehensive planning is completed. The implementation program needs to be integrated with planning, monitoring and evaluation to properly implement adaptive management. Projects “on the shelf” are an important asset for cost savings and accessing funding through grants and other opportunities.

In addition, we lack capacity to properly integrate fire management on the Preserve with the Forest Service. While the Forest Service provides incident response services, there is not a system to develop and maintain fire management and supporting skills for Trust employees. Trust employees with National Wildland Fire Qualifications have not been able to acquire red cards and participate in fire management activities as required to maintain qualifications.

Achieving this goal will require one permanent full time employee, with a background in forestry and fire management to work with the current Natural Resource Coordinator to implement the Trust’s Wildland Fire Management Policy and initiate an annual program of work to support Landscape Forest Restoration in the future.

4.4 Public Use and Access

4.4.1 Compliance with the Americans with Disabilities Act (ADA)

Objective

Ensure facilities currently being made available to the public fully meet ADA compliance.

Metric

Work planning complete and approved for implementation.

Narrative

Even though some improvements have been made, certain structural elements including counter heights, wheelchair ramps, widths and sizes of hallways, entrances, and restrooms need to be addressed to ensure full compliance.

4.4.2 Christmas Tree Harvesting Program

Objective

Evaluate the economic feasibility of establishing a Christmas tree harvesting program on the Preserve for implementation in FY 2010

Metric

Complete the analysis, determine feasibility.

Narrative

It has long been a desire by the public and the Board of Trustees to realize a Christmas tree program on the Preserve. There are several alternatives for implementing a program that would address the issues of transporting the trees through the National Forest, uncertainty with weather and access, and potentially high costs. There are also opportunities to include altruistic programs and generate revenue.

4.5 Planning

4.5.1 Public Access and Use Planning

Objective

Develop alternatives for managing public access to and use of the Preserve for recreation, education, science, commercial and other purposes. This planning effort is current referred to as "Public Access and Use".

Metric

Federal Register publication of the Notice of Intent to prepare an Environmental Impact Statement

Narrative

Using the information collected through public workshops held in FY 2007 and strategic business planning completed in FY 2008, the Trust will put forward a comprehensive set of alternatives for the development of programs, facilities, and infrastructure for public use and

access to the Preserve. The alternatives will vary in the location and scale of development as well as the level of investment and expected revenue. The public will be able to participate in the process through workshops and other collaborative opportunities.

This will be the most substantial planning effort needed for the comprehensive management of the Preserve. Public use and access to the Preserve for its recreational, scenic, cultural, scientific, educational, and spiritual values is likely the cornerstone for financial self sufficiency. The planning process will highlight the complexities of balancing multiple uses, protecting resources and values, providing access, and achieving financial self sufficiency on this unique and treasured landscape.

Our approach involves collaboration with the public and other stakeholders at multiple opportunities and scales. On a spectrum of public involvement, collaboration moves beyond informing, consulting, or involving stakeholders. Collaboration can be hard work that requires public commitment, different types of skills and resources, and a new way of approaching environmental impact processes. Case studies show that collaborative processes, when employed by federal managers in a variety of contexts, yield benefits well worth the investment. Collaborative approaches can improve the quality of decision-making and increase the public trust and confidence in an agency's decision.

4.5.2 Landscape Forest Restoration Program

Goal

Initiate planning for Landscape Forest Restoration.

Objective

Complete existing condition report, develop purpose and need and proposed action for the management of forests and fire on the Preserve.

Metric

Federal Register publication of the Notice of Intent to prepare an Environmental Impact Statement.

Narrative

The Trust will propose goals, objectives and monitored outcomes as well as actions and priorities for the landscape restoration of forests and ecosystems on the Preserve, including the management of fire. Using the Preserve-wide forest inventory the Trust is intending to make a decision under NEPA to allow the Preserve to use adaptive management to accomplish an aggressive annual program of work to restore the health and resiliency of the Preserve's forests; reduce risks to losses from catastrophic wildfire, insects, and disease; and improve the deliverance of ecosystem services such as habitat, watershed process, and carbon sequestration. By focusing on objectives and outcomes the Trust can reduce the cost and times associated with redundant planning and invest instead, in resource management actions and monitoring.

The Trust is collaborating with the Santa Fe National Forest; New Mexico Forest and Watershed Restoration Institute, Highlands University; and The Nature Conservancy, Fire and Forest Program; in the development of the purpose and need, proposed action and alternatives for landscape restoration. We will also be engaging land managers in adjacent watersheds including Santa Clara Pueblo, and Bandelier National Monument in this process.

Section - 5 Appendices

5.1 Current Board of Trustees

Background

The Valles Caldera Preservation Act provides that, “In general the Trust shall be governed by a nine member Board of Trustees consisting of the Superintendent of the Santa Fe National Forest, United States Forest Service; the Superintendent of Bandelier National Monument, National Park Service; and seven individuals, appointed by the President with specific expertise or representing an organization or government entity as described.” As indicated in Table 3 below, four board members are outgoing as of the publication of this report. New members remain to be appointed. While delays in such appointments are the norm, timely appointments would allow for a smoother transition.

TABLE 3 – CURRENT BOARD OF TRUSTEES

CURRENT TRUSTEE	TERM ENDING	POSITION/EXPERTISE
Dan Jirón	Ex Officio	Supervisor, Santa Fe National Forest
Brad Traver	Ex Officio	Superintendent, Bandelier National Monument
Tracy Hephner	January 16, 2009	Expertise in aspects of domestic livestock management, production, and marketing.
Stephen Henry (Secretary)	January 16, 2011	Expertise in game and nongame wildlife and fish populations.
James Gosz	January 16, 2009	Expertise in sustainable forest management for commodity and non-commodity purposes.
James Range	January 16, 2011	Active in a nonprofit conservation organization interested in the activities of the Forest Service.
Ed Tinsley (Vice Chair)	January 16, 2011	Expertise in financial management, budget and program analysis and small business management.
William Keleher (Chair)	January 16, 2009	Expertise in the natural and cultural history of the area.
Dr. Raymond Loretto, DVM	January 16, 2009	Active in State or Local Government in New Mexico, with expertise of the customs of the local area.

5.2 Program Area Outcomes

The following tables provide a brief metric of FY 2008 by budget program area.

TABLE 4 – ADMINISTRATIVE OUTCOMES

Activity	Outputs	Planned	Accomplished	Status	Planned FY
BOARD					
Public Meetings	Each	3	4	Annual	Ongoing
BUDGET					
1106	Dollars	56,400	56,400	Complete	2008
5363	Dollars	100	185	Ongoing	2010
PERSONNEL					
Budget	% of total	40%	44%	Annual	Ongoing
SAFETY					
Reported Incidents	Each	0	1	Annual	Ongoing
Claims	Dollars	\$34,494.60	35,267.20 ⁴	Annual	Ongoing

TABLE 5 – COMMUNITY SERVICES

Activity	Outputs	Planned	Accomplished	Status	Planned FY
EDUCATION					
K12	Group/Individuals		16 / 392	Ongoing	Annual
University	Group/Individuals		7 / 101	Ongoing	Annual
Educators	Group/Individuals		6 / 100	Ongoing	Annual
AGENCIES/ORG					
Agency	Group/Individuals		8 / 318	Ongoing	Annual
Organization	Group/Individuals		3 / 54	Ongoing	Annual
PRESENTATIONS					
Educational	Group/Individuals		4 / 305	Ongoing	Annual

⁴ Includes \$34,494.60 paid in FY 2008 for a claim made in FY 2007 and \$772.60 claim for field related knee injury in FY 2008.

Agency	Group/Individuals	2 / 39
Organization	Group/Individuals	4 / 165
COLLABORATIONS		
Collaborative Groups	Organizations	5 Ongoing Annual

TABLE 6 – PRESERVE OPERATIONS

Activity	Outputs	Planned	Accomplished	Status	Completion FY
INCIDENT MANAGEMENT					
Wildland Fire	Acres	0	.5	Annual	Ongoing
Law Enforcement					
MUSY					
Timber/Wood	Cubic Feet	0	0	Annual	Ongoing
Forage	AUM's	8,000	5488	Annual	Ongoing
RESOURCE MANAGEMENT					
Restoration	Acres	0	10	Annual	Ongoing
INFRASTRUCTURE					
Road Maintenance	Miles			Annual	Ongoing
FACILITIES					
Upgrades	Projects	1	1	Annual	Ongoing
Maintenance	Dollars			Annual	Ongoing
Deferred Maintenance	Dollars			Annual	Ongoing

TABLE 7 - RECREATION

Activity	Outputs	Planned	Accomplished	Status	Planned FY
HUNTING					
Revenues	Dollars	350,000	368,776	Ongoing	Annual
FISHING					
				Ongoing	FY2009

	Capacity	80%	46%/
SUMMER			
	Capacity	80%	28%
WINTER			
	Capacity	80%	36%
SPECIAL EVENTS			
	Capacity	80%	
SERVICES			
Facility Rental	Capacity	50%	12%
Concessions	Dollars		

TABLE 8 - PLANNING

Activity	Outputs	Planned	Accomplished	Status	Planned FY
ADMN	Plans	1		Active	2009
NARM					
San Antonio Watershed Restoration	Acres	TBD		Active	2009
Redondo Canyon Stewardship Project	Acres	600		Active	2009
MUSY					
MUSY-Forage	Acres	88,900		Active	2009

TABLE 9 - SCIENCE

Activity	Outputs	Planned	Accomplished	Status	Planned FY
INVENTORY					
Forest Inventory	Acres	56,400	56,400	Complete	2008
Road Inventory	Miles	100	185	Ongoing	2010
Geology	Acres	88,900	88,900	Complete	2008
Soils	Acres	88,900	88,900	Complete	2008
Cultural Resource Inventory	Acres		960	Ongoing	Annual

Socioeconomic Survey	Project	1		Active	2009
MONITORING					
Range Monitoring	Sites	82	82	Ongoing	Annual
Toledo Rx Fire	Sites	40	40	Complete	Complete
Elk/Cattle Exclosure	Sites	18	18	Ongoing	Periodic
Elk Population Monitoring	Sites	4	4	Ongoing	Annual
Forest Thinning	Sites	9	9	Ongoing	Annual
Climate	Sites	5	5	Ongoing	Continuous
Water Quality	Streams	4	4	Ongoing	Continuous/Seasonal
Fisheries	Sites	6	6	Ongoing	Annual
CR Site Monitoring	Sites		69	Ongoing	Annual
RESEARCH					
Extramural Research	Dollars	\$1,400,000	\$1,628,882	Ongoing	Annual
Extramural Research	Projects	25	32	Ongoing	Annual

5.3 Distribution List

5.1.1 United States House of Representatives

Representative Ben R. Lujan, District 3, New Mexico

Representative Martin Heinrich, District 1, New Mexico

Representative Harry Teague, District 2, New Mexico

5.1.2 United States Senate

Senator Jeff Bingaman, New Mexico

Senator Tom Udall, New Mexico

5.1.3 Committees

House Committee on Natural Resources

House Appropriations Committee

Senate's Energy and Natural Resource Committee, Frank Gladics

Senate Appropriations Committee

5.1.4 United States Department of Agriculture

Secretary of Agriculture

Under Secretary for Natural Resources, Mark Rey

Chief of the Forest Service, Abigail Kimbell

Regional Forester, Southwestern Region, Corbin Newman

Forest Supervisor, Santa Fe National Forest, Dan Jiron

Valles Caldera Trust, Board of Trustees (see Table 3)