2023-2024 OSM WORK PLAN APPLICATION

This form will be used to assess the merits of the proposed work plan and its fit with the Oil Sands Monitoring (OSM) Program mandate and strategic priorities. Applicants must complete the form in its entirety. Applicants that fail to use this form and complete all sections in the timeframe will not be considered.

*OSM Work Plan Submission Deadline: The deadline for submission of proposed work plans is **October 31, 2022 at 4:30 PM Mountain Standard time.** Late submissions will not be accepted.*	**October 31, 2022** *4:30 PM MST*
Decision Notification	*Mid to Late March 2023*

WORK PLAN COMPLETION

*Please **Enable Macros** on the form when prompted.*

The applicant is required to provide information in sufficient detail to allow the evaluation team to assess the work plan. Please follow the requirements/instructions carefully while at the same time being concise in substantiating the project's merits. *The OSM Program is not responsible for the costs incurred by the applicant in the preparation and submission of any proposed work plan.*

Privacy: *The OSM Program is governed by the Freedom of Information and Protection of Privacy Act (FOIP) and may be required to disclose information received under this Application, or other information delivered to the OSM Program in relation to a Project, when an access request is made by anyone in the public. Applicants are encouraged to familiarize themselves with FOIP. All work plans are public documents.*

Technical Requirements: When working on this form, please maintain Macros compatibility by always saving your draft and your final submission as a **Microsoft Word Macro-Enabled Document**, failure to do so will result in loss of form functionality**.** This form was created using Microsoft word 2016 on a PC and may not have functionality on other versions of Microsoft on PC or MACS.

Government Lead/Coordinator: All work plans under the OSM Program require either a government lead or a government coordinator. This will ensure that the financial tables (for Alberta Environment and Parks & Environment and Climate Change Canada) are completed accurately for work plan consideration. ***However,*** if an ***Indigenous community, environmental nongovernmental organization*** or any other ***external partner*** is completing a work plan proposal, they would ***only*** complete the ***grant or contract budget component*** of the ***Human Resources & Financials Section*** for their project. *The government coordinator within Alberta Environment & Parks would be responsible for completing the remaining components of the Human Resources and Financial Section of this Work Plan Application, as they are responsible for contract and grant facilitation of successful submissions. All other sections outside of **Human Resources & Financials Section** of this work plan proposal are to be completed in full by all applicants.*

Supplemental Materials: *The OSM Program recognizes that majority of work planning submissions are a result of joint effort and monitoring expertise. Should the applicant wish to submit supplemental materials in addition to their application additional resources are available in the Work Planning Package accessible here:* **2023-24 Work Planning Package (Ctrl+CLICK)**

*Should you have any **questions** about completing this work planning form or uploading your final submission documents, please send all inquiries by email to:* **OSM.Info@gov.ab.ca.**

WORK PLAN SUBMISSION

*Upon completion of this application, please submit the <u>appropriately named</u> work plan (**Microsoft Word Macro-Enabled Document**) and all supporting documents to the link provided below. Failure to follow the naming convention provided may result in oversight of your application.*

*Please upload (by drag and dropping) the **WORK PLAN SUBMISSION & ALL SUPPORTING DOCUMENTS** here:*

WORK PLAN SUBMISSION LINK (CTRL+CLICK HERE)

Please use the following file naming convention when submitting your WORK PLAN:

o

Example:

202324_wkpln_OilSandsResiduesinFishTissue_SmithJoe

If applicable, **please use the following file naming convention when submitting your supplementary or supporting files.** Please number them according to the guidance and examples provided:

202324_sup##_WorkPlanTitle_ ProjectLeadLastNameFirstName

Examples:

202324_sup01_OilSandsResiduesinFishTissue_SmithJoe
202324_sup02_OilSandsResiduesinFishTissue_SmithJoe

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202324_sup10_OilSandsResiduesinFishTissue_SmithJoe

Do not resave your work plan or documents under any other naming conventions. *If you need to make revisions and resubmit before the work planning deadline of October 31, 2022, **DO NOT** rename your submission. When resubmitting, simply resubmit with the exact naming convention so that it replaces the original submission. **DO NOT** add any additional components such as versioning or dates to the file naming convention. Please direct any questions regarding the submission or naming of submissions to **OSM.Info@gov.ab.ca**.*

WORK PLAN APPLICATION

PROJECT INFORMATION

Project Title:	Oil Sands Monitoring Program Administration
Lead Applicant, Organization, or Community:	Alberta Environment and Protected Areas
Work Plan Identifier Number: *If this is an on-going project please fill the identifier number for 22/23 fiscal by adjusting the last four digits: **Example:** D-1-2223 would become D-1-**2324***	Click or tap here to enter text.
Project Region(s):	Oil Sands Region
Project Start Year: *First year funding under the OSM program was received for this project (if applicable)*	Ongoing
Project End Year: *Last year funding under the OSM program is requested **Example: 2024***	Ongoing
Total 2023/24 Project Budget: *For the 2023/24 fiscal year*	$0.00
Requested OSM Program Funding: *For the 2023/24 fiscal year*	$2,428,953.00
Project Type:	Choose an item.
Project Theme:	Choose an item.
Anticipated Total Duration of Projects (Core and Focused Study (3 years))	Choose an item.
Current Year	**Focused Study:** Choose an item.
	Core Monitoring: Choose an item.

CONTACT INFORMATION

Lead Applicant/ Principal Investigator: *Every work plan application requires one lead applicant. This lead is accountable for the entire work plan and all deliverables*.	Nora Abercrombie
Job Title:	Director, Governance and Corporate Services, OSM Branch, AEPP
Organization:	AEPA
Address:	9th floor, 9888 Jasper Ave, Edmonton, AB T5J 5C6
Phone:	7802926480
Email:	Nora.abercrombie@gov.ab.ca

PROJECT SUMMARY

Should your application be successful, The OSM Program reserves the right to publish this work plan application. Please check the box below to acknowledge you have read and understand:

☐ *I acknowledge and understand*

In the space below please provide a summary (300 words max) of the proposed project that includes a brief overview of the project drivers and objectives, the proposed approach/methodology, project deliverables, and how the project will deliver to the OSM Program objectives. The summary should be written in plain language.

OSM Science and Program Secretariat (Program Office): Alberta Environment and Protected Areas(AEPA) and Environment and Climate Change Canada (ECCC) Oil Sands Science Secretariat jointly manage the monitoring program as outlined in the approved annual monitoring plan and associated work plans. The Secretariat provides coordination and support across the spectrum of planning, delivery, and reporting for the OSM program.

Specifically, the Secretariat supports Science Co-Leads, Program Co-Chairs, OSM governance structure, and others as required to oversee work planning, implement executive and committee decisions, manage issues, coordinate project delivery, report on project progress, and respond to stakeholders as required. The Secretariat also coordinates various programmatic activities, including select governance committees (OCs, SIKIC), OSM product process, aspects of public reporting on the OSM program, access to data and information (e.g. science/technical series, program reports and other OSM products), and other key areas.

This year, the Program Office also proposes to support:

1) the two independent third-party science and governance/management review of the program ($750K), and

3) A competitive contract to develop a comprehensive communication/knowledge transfer strategy that addresses the needs of all participants in the OSM Program ($100K).

1.0 Merits of the Work Plan

All work plans under the OSM Program must serve the mandate of the program by determining (1) if changes in indicators are occurring in the oil sands region and (2) if the changes are caused by oil sands development activities and (3) the contribution in the context of cumulative effects. In the space below please provide information on the following:

- *Describe the key drivers for the project identifying linkages to Adaptive Monitoring framework particularly as it relates to surveillance, confirmation and limits of change (as per OC approved Key Questions).*
- *Explain the knowledge gap as it relates to the Adaptive Monitoring that is being addressed along with the context and scope of the problem as well as the Source – pathway – Receptor Conceptual Models .*
- *Describe how the project meets the mandate of the OSM Program or areas of limited knowledge is the work being designed to answer with consideration for the TAC specific Scope of Work Document (attached) and the Key Questions (attached)?*
- *Discuss results of previous monitoring/studies/development and what has been achieved to date. Please identify potential linkages to relevant sections of the State of Environment Report.*

The Science Co-Leads, together with the Program Co-Chairs and governance committees, play an integral part in the delivery of an integrated environmental monitoring, evaluation and reporting program for the oil sands region to enhance understanding of the cumulative effects of oil sands development activities. To this end, the key objectives of this work plan are:
- To deliver, in a strategic and integrated manner, both program and science support components of the OSM program as directed by the Science Co-Leads, program executives, and the broader program
- To support the OSM Science Co-Leads as well as the broader program, with content development as required within the OSM governance structure (i.e., TACs, ICBMAC, SIKIC, and Oversight Committee)
- To work collaboratively with the other program areas to support the OSM program governance, through coordination of meetings, implementing resulting actions and deliverables, as well as engagement with AEP and ECCC science and technical staff contributing to the program on planning, implementation and reporting of approved work.
This year, we propose to fund an indendepent, 5-year review of the program (as per the MOU and OFA), substantive improvements in the work planning process based on known issues and the development of a comprehensive strategic communication/knowledge translation plan.

2.0 Objectives of the Work Plan

List in point form the Objectives of the 2023/24 work plan below

OSM Science Secretariat:
1. Support the OSM Science Co-Leads, and broader program, in developing, delivering and reporting on the annual monitoring plan. This includes, but is not limited to, content development (e.g., terms of reference), presentations and synthesis of the science program and updates as requested by the OSM governance structure (i.e., TACs, ICBMAC, SIKIC, and Oversight Committee); development and delivery of the OSM Program Science Plan.
2. Active engagement with, and support to, the Science Co-Leads, other OSM executives, Project Leads, and scientific staff as well as coordination of select governance committees (OC and SIKIC)
3. Working with all program areas to coordinate the strategic and integrated delivery of the work planning process for 2022-23.
4. Ongoing coordination and delivery of the OSM product process, development and coordination of Science Forum, Technical Workshops and follow-up of resulting deliverables/outcomes
5. Lead development and delivery of the OSM data portal through Service Alberta.
6. Coordinate and support critical science, field activity functions including, but not limited to, oversight of lease and management of a program staging area for field work and sample storage in Fort McMurray
7. Provide secretariat services for the OSM Governance Structure
8. Manage Standard Operating Practices

9. Brief OSM leadership on IRMS/OSM connections, opportunities and risks.
10. Financial support for the 5-year review of the science program as well as the governance of the program.
11. Improve the ease and capability of the work planning process.
12. Create a comprehensive, strategic communication and knowledge translation plan for the program.

3.0 Scope

<div style="border:1px solid; background:#e5efda; padding:10px">

Evaluation of Scope Criteria (Information Box Only- No action required)
Your workplan will be evaluated against the criteria below. A successful workplan would:

- be in scope of the OSM Program (e.g., regional boundaries, specific to oil sands development, within boundaries of the Oil Sands Environmental Monitoring Program Regulation)
- consider the TAC-specific Scope of Work document and the key questions
- integrate western science with Indigenous Community-Based Monitoring)
- address the Adaptive Monitoring particularly as it relates to surveillance, confirmation and limits of change as per approved Key Questions.

- have an experimental design that addresses the Pressure/Stressor, Pathway/Exposure, Response continuum
- produce data/knowledge aligned with OSM Program requirements and is working with Service Alberta
- uses Standard Operating Procedures/ Best Management Practices/ Standard Methods including for Indigenous Community-Based Monitoring

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3.1 Sub Theme

Please select from the dropdown menu below the theme(s) your monitoring work plan relates to:

Cross Cutting

3.2 Core Monitoring or Focused study

Please select from the dropdown menu below if the monitoring in the work plan is "core monitoring" and/or a "focused study". Core monitoring are long term monitoring programs that have been in operation for at least 3 years, have been previously designated by the OSM program as core, and will continue to operate into the future. Focused studies are short term projects 1-2 years that address a specific emerging issue. For the purposes of 2023/24 work planning all Community Based Monitoring Projects are Focused Studies.

Choose an item.

3.3 Sub Theme Key Questions

Please select from the dropdown menus below the sub-theme(s) your monitoring work plan relates to and address the Key Questions:

3.3.1   Surface Water Theme

3.3.1.1. Sub Themes:

Choose an item.

3.4.1.2 Surface Water Key Questions

Explain how your surface water monitoring program addresses the key questions below.

1. Has baseline been established? Have thresholds or limits of change been identified?

Click or tap here to enter text.

2. Are changes occurring in water quality, biological health (e.g., benthos, fish) and/or water quantity/flows relative to baseline? If yes, is there evidence that the observed change is attributable to oil sands development? (Describe source-pathway-receptor and/or conceptual models and what is the contribution in the context of cumulative effects?

Click or tap here to enter text.

3. Are there unanticipated results in the data? If yes, is there need for investigation of cause studies?

Click or tap here to enter text.

4. Are changes in water quality and/or water quantity and/or biological health informing Indigenous key questions and concerns?

Click or tap here to enter text.

5. Are data produced following OSM Program requirements and provided into the OSM Program data management system?

Click or tap here to enter text.

6. Do methodologies use relevant Standard Operating Procedures/ Best Management Practices/ Standard Methods?

Click or tap here to enter text.

7. How does the monitoring identify integration amongst projects, themes or with communities?

Click or tap here to enter text.

8. With consideration for adaptive monitoring, where does the proposed monitoring fit on the conceptual model for the theme area relative to the conceptual model for the OSM Program?

Click or tap here to enter text.

9. How will this work advance understanding transition towards adaptive monitoring?

Click or tap here to enter text.

10. Is the work plan contributing to Programmatic State of Environment Reporting? If yes, please identify potential linkages to relevant sections of the State of Environment Report.

Click or tap here to enter text.

3.3.2 Groundwater Theme

3.3.2.1 Sub Themes:

Choose an item.

3.3.2.2 Groundwater Key Questions

Explain how your groundwater monitoring program addresses the key questions below.

1. Has baseline been established? Have thresholds or limits of change been identified?

Click or tap here to enter text.

2. Are changes occurring in groundwater quality and/or quantity relative to baseline? If yes, is there evidence that the observed change is attributable to oil sands development? *(Describe source-pathway-receptor and/or conceptual models)* and what is the contribution in the context of cumulative effects?

Click or tap here to enter text.

3. Are there unanticipated results in the data? If yes, is there need for investigation of cause studies?

Click or tap here to enter text.

4. Are changes in groundwater quality and/or quantity informing Indigenous key questions and concerns Indigenous concerns and health?

Click or tap here to enter text.

5. Are data produced following OSM Program requirements and provided into the OSM Program data management system?

Click or tap here to enter text.

6. Do methodologies use relevant Standard Operating Procedures/ Best Management Practices/ Standard Methods?

Click or tap here to enter text.

7. How does the monitoring identify integration amongst projects, themes or with communities?

Click or tap here to enter text.

8. With consideration for adaptive monitoring, where does the proposed monitoring fit on the conceptual model for the theme area relative to the conceptual model for the OSM Program?

Click or tap here to enter text.

9. How will this work advance understanding transition towards adaptive monitoring?

Click or tap here to enter text.

10. Is the work plan contributing to Programmatic State of Environment Reporting? If yes, please identify potential linkages to relevant sections of the State of Environment Report.

Click or tap here to enter text.

3.3.3   Wetlands Theme

3.3.3.1 Sub Themes:

Choose an item.

3.3.3.2 Wetlands - Key Questions

Explain how your wetlands monitoring program addresses the key questions below.

1. Has baseline been established? Have thresholds or limits of change been identified?

Click or tap here to enter text.

2. Are changes occurring in wetlands due to contaminants and hydrological processes? If yes, is there evidence that the observed change is attributable to oil sands development? (Describe source-pathway-receptor and/or conceptual models) and what is the contribution in the context of cumulative effects?

Click or tap here to enter text.

3. Are there unanticipated results in the data? If yes, is there need for investigation of cause studies?

Click or tap here to enter text.

4. Are changes in wetlands informing Indigenous key questions and concerns?

Click or tap here to enter text.

5. Are data produced following OSM Program requirements and provided into the OSM Program data management system?

Click or tap here to enter text.

6. Do methodologies use relevant Standard Operating Procedures/ Best Management Practices/ Standard Methods?

Click or tap here to enter text.

7. How does the monitoring identify integration amongst projects, themes or with communities?

Click or tap here to enter text.

8. With consideration for adaptive monitoring, where does the proposed monitoring fit on the conceptual model for the theme area relative to the conceptual model for the OSM Program?

Click or tap here to enter text.

9. How will this work advance understanding transition towards adaptive monitoring?

Click or tap here to enter text.

10. Is the work plan contributing to Programmatic State of Environment Reporting? If yes, please identify potential linkages to relevant sections of the State of Environment Report.

Click or tap here to enter text.

3.3.4   Air Theme

3.3.4.1 Sub Themes:

Choose an item.

3.3.4.2 Air & Deposition - Key Questions

Explain how your air & deposition monitoring program addresses the key questions below.

1. Has baseline been established? Have thresholds or limits of change been identified?

Click or tap here to enter text.

2. Are changes occurring in air quality? If yes, is there evidence that the observed change is attributable to oil sands development? (Describe source-pathway-receptor and/or conceptual models) and what is the contribution in the context of cumulative effects?

Click or tap here to enter text.

3. Are there unanticipated results in the data? If yes, is there need for investigation of cause studies

Click or tap here to enter text.

4. Are changes in air quality informing Indigenous key questions and concerns?

Click or tap here to enter text.

5. Are data produced following OSM Program requirements and provided into the OSM Program data management system?

Click or tap here to enter text.

6. Do methodologies use relevant Standard Operating Procedures/ Best Management Practices/ Standard Methods?

Click or tap here to enter text.

7. How does the monitoring identify integration amongst projects, themes or with communities?

Click or tap here to enter text.

8. With consideration for adaptive monitoring, where does the proposed monitoring fit on the conceptual model for the theme area relative to the conceptual model for the OSM Program?

Click or tap here to enter text.

9. How will this work advance understanding transition towards adaptive monitoring?

Click or tap here to enter text.

10. Is the work plan contributing to Programmatic State of Environment Reporting? If yes, please identify potential linkages to relevant sections of the State of Environment Report.

Click or tap here to enter text.

3.3.5   Terrestrial Biology Theme

3.3.5.1 Sub Themes:

Choose an item.

3.3.5.2 Terrestrial Biology - Key Questions

Explain how your terrestrial biological monitoring program addresses the key questions below.

1. Has baseline been established? Have thresholds or limits of change been identified?

Click or tap here to enter text.

2. Are changes occurring in terrestrial ecosystems due to contaminants and landscape alteration? If yes, is there evidence that the observed change is attributable to oil sands development? (Describe source-pathway-receptor and/or conceptual models) and what is the contribution in the context of cumulative effects?

Click or tap here to enter text.

3. Are there unanticipated results in the data? If yes, is there need for investigation of cause studies?

Click or tap here to enter text.

4. Are changes in terrestrial ecosystems informing Indigenous key questions and concerns?

Click or tap here to enter text.

5. Are data produced following OSM Program requirements and provided into the OSM Program data management system?

Click or tap here to enter text.

6. Do methodologies use relevant Standard Operating Procedures/ Best Management Practices/ Standard Methods?

Click or tap here to enter text.

7. How does the monitoring identify integration amongst projects, themes or with communities?

Click or tap here to enter text.

8. With consideration for adaptive monitoring, where does the proposed monitoring fit on the conceptual model for the theme area relative to the conceptual model for the OSM Program?

Click or tap here to enter text.

9. How will this work advance understanding transition towards adaptive monitoring?

Click or tap here to enter text.

10. Is the work plan contributing to Programmatic State of Environment Reporting? If yes, please identify potential linkages to relevant sections of the State of Environment Report.

Click or tap here to enter text.

3.3.6   Cross-Cutting Across Theme Areas

3.3.6.1 Sub Themes:

Other: (Describe in space below)

If "Other" was selected from the drop down list above please describe below:

Administration

3.3.6.2 Cross-Cutting - Key Questions

Explain how your cross-cutting monitoring program addresses the key questions below.

1. Is data produced following OSM Program requirements and provided into the OSM Program data management system?

NA

2. Do methodologies use relevant Standard Operating Procedures/ Best Management Practices/ Standard Methods?

yes

3. How does the monitoring identify integration amongst projects, themes or with communities?

NA

4. With consideration for adaptive monitoring, where does the proposed monitoring fit on the conceptual model for the theme area relative to the conceptual model for the OSM Program?

NA

5. How will this work advance understanding transition towards adaptive monitoring?

NA

6. Is the work plan contributing to Programmatic State of Environment Reporting? If yes, please identify potential linkages to relevant sections of the State of Environment Report.

Directly supports with admin, facilitation, project management.

4.0 Mitigation

> **Evaluation of Mitigation Criteria (Information Box Only- No action required)**
> Your workplan will be evaluated against the criteria below. A successful workplan would potentially inform:
> - efficacy of an existing regulation or policy
> - an EPEA approval condition
> - a regional framework (i.e., LARP)
> - an emerging issue

Explain how your monitoring program informs management, policy and regulatory compliance. As relevant consider adaptive monitoring and the approved Key Questions in your response.

The Science Co-Leads report to the Program Co-Chairs and are responsible for leading all OSM content development, working in conjunction with parties in the OSM governance structure and Project Leads. This project provides critical support to the Science Co-Leads and Program Co-Chairs in implementing joint commitments regarding the Oil Sands Monitoring program including support for content development across the OSM program. This project will also provide support for work planning, implementation of approved work plans, data management and portal access as well as reporting through program and technical products. The Oil Sands Monitoring Program is jointly managed by AEPP and ECCC; both entities are equally accountable for the successful delivery of all oil sands monitoring activities. The Secretariat also directly supports the Program Co-Chairs in the delivery of joint commitments on behalf of the Government of Alberta and the Government of Canada.

5.0 Indigenous Issues

Evaluation of Indigenous Issues Criteria (Information Box Only- No action required)
Your workplan will be evaluated against the criteria below. A successful workplan would potentially:

- Investigate Indigenous communities key questions and concerns
- Includes culturally relevant receptor(s) and indicator(s)
- Include or be driven by Indigenous communities (participatory or collaborative)
- Develop capacity in Indigenous communities
- Include a Council Resolution or Letter of Support from one or more Indigenous communities
- Describe how ethics protocols and best practices regarding involvement of Indigenous peoples will be adhered to
- Provide information on how Indigenous Knowledge will be collected, interpreted, validated, and used in a way that meets community Indigenous Knowledge protocols

Explain how your monitoring activities are inclusive and respond to Indigenous key questions and concerns and inform the ability to understand impacts on concerns and inform Section 35 Rights

This project provides support to all members on the OSM governance structure including Indigenous Representatives and communities.

Does this project include an Integrated Community Based Monitoring Component?

No

If YES, please complete the [ICBM Abbreviated Work Plan Forms](#) and submit using the link below

[ICBM WORK PLAN SUBMISSION LINK (CTRL+CLICK HERE)](#)

5.1 Alignment with Interim Ethical Guidelines for ICBM in the OSM Program

1. Are there any community specific protocols that will be followed?

No

2. Does the work plan involve methods for Indigenous participants to share information or knowledge (e.g. interview, focus group, survey/structured interview), or any other Indigenous participation? If yes, describe how risks and harms will be assessed, and the consent process that will be used.

The Program Office supports the protection of IK as per the draft interim ethical guidelines and specific communit protocols.

3. Do the activities include any other collecting/sharing, interpreting, or applying Indigenous knowledge? Please describe how these activities will be conducted in alignment with the Interim Ethical Guidelines, and any community-based protocols and/or guidelines that may also apply.

No

4. Indicate how Indigenous communities / Indigenous knowledge holders will be involved to ensure appropriate analysis, interpretation and application of data and knowledge.

Indigenous Knowledge Holders/Elders will be invited to governance table meetings to provide ceremony and advice.

5. How are Indigenous communities involved in identifying or confirming the appropriateness of approach, methods, and/or indicators?

NA

6. How does this work plan directly benefit your community?   How does it support capacity building in your community?

NA

7. How is the information from this work plan going to be reported back to your community in a way that is accessible, transparent and easy to understand?

The Admin work plan supports knowledge transfer generally. It also includes a component to develop a communication strategy.

6.0 Measuring Change

Evaluation of Measuring Change Criteria (Information Box Only- No action required)

Your workplan will be evaluated against the criteria below. A successful workplan would potentially:

- assess changes in environmental conditions compared to baseline (e.g., validation of EIA predictions)
- report uncertainty in estimates and monitoring is of sufficient power to detect change due to oil sands development on reasonable temporal or spatial scales
- include indicators along the spectrum of response (e.g., individual, population, community)
- focus on areas of highest risk (where change is detected, where change is greater than expected, where development is expected to expand (collection of baseline)
- measure change along a stressor gradient or a stressor/reference comparison

Explain how your monitoring identifies environmental changes and how can be assessed against a baseline condition. As relevant, consider adaptive monitoring, the TAC specific Scope of Work document and the Key Questions in your response.

NA

7.0 Accounting for Scale

Evaluation of Accounting for Scale Criteria (Information Box Only- No action required)
Your workplan will be evaluated against the criteria below. A successful workplan would potentially be:

- appropriate to the key question and indicator of interest
- relevant to sub-regional and regional questions
- relevant to organism, population and/or community levels of biological organization
- where modelled results are validated with monitored data
- where monitoring informs on environmental processes that occur at a regional scale. e.g. Characterizing individual sources to gain a regional estimate of acid deposition and understand signal from individual contributing sources.

Explain how your monitoring tracks regional and sub-regional state of the environment, including cumulative effects. As relevant, consider adaptive monitoring, the TAC specific Scope of Work document and the Key Questions in your response.

NA

8.0 Transparency

Evaluation of Transparency Criteria (Information Box Only- No action required)
Your workplan will be evaluated against the criteria below. A successful workplan would potentially include:

- a plan for dissemination of monitoring data, including appropriate timing, format, and aligns with OSM program data management plan
- demonstrated transparency in past performance
- identified an annual progress report as a deliverable
- reporting of monitoring results occurs at timing and format that is appropriate for recipient audience.

Explain how your monitoring generates data and reporting that is accessible, credible and useful. As relevant, consider adaptive monitoring, the TAC specific Scope of Work document and the Key Questions in your response.

NA

9.0 Efficiency

Evaluation of Efficiency Criteria (Information Box Only- No action required)
Your workplan will be evaluated against the criteria below. A successful workplan would include:

- appropriately addressed a risk-informed allocation of resources
- identified the role and justification for each staff member on the proposed work plan
- identified in-kind and leveraged resources (e.g., resources and approaches are appropriately shared with other OSM projects where possible)
- established partnerships (value-added) and demonstrated examples of coordinated efficiencies (e.g., field, analytical)
- identified co-location of monitoring effort
- demonstrated monitoring activities and information collected are not duplicative
- considered sampling/measurement/methods compatibility to other data sources (e.g., AER)

Explain how your monitoring is integrated with other OSM projects and incorporates community-based participation and/or engagement in proposed monitoring activities. As relevant, consider adaptive monitoring, the TAC specific Scope of Work document and the Key Questions in your response.

NA

10.0 Work Plan Approach/Methods

10.1 List the Key Project Phases and Provide Bullets for Each Major Task under Each Project Phase *

> 1. Science Program Oversight
> a. Oversee annual work planning process
> b. Coordinate and support TACs, SIKIC, ICBMAC, and OC meetings and logistics as required
> c. Engage external experts to provide scientific support including facilitation to TACs, SIKIC and ICBMAC activities as required.
> 2. Scientific content development
> a. Develop materials and scientific content to support TAC, SIKIC, ICBMAC and OC members
> b. Develop OSM science program synthesis updates throughout year and as requested by the OSM governance structure.
> 3. Oil Sands Monitoring Technical Workshop support
> 4. OSM Reporting Products:
> a. Coordinate and oversee the OSM product review and tracking process
> b. Oversee activities to review, format, publish and produce OSM science products, science communications, books, technical reports, and as required
> 5. Capacity Development: "Team Building", facilitation, consensus decision making training workshop for TACs and Project Leads
> 6. Oversee the implementation of the OSM Program's Indigenous Community Based Monitoring Capacity Office Work plan and Satellite Office in Fort McMurray
> 7. Lead development and delivery of the OSM data portal through Service Alberta.
> 8. Coordinate and support critical science, field actitivity functions including, but not limited to, oversight of lease and management of a program staging area for field work and sample storage in Fort McMurray
> 9. Provide secretariat services for the OSM Governance Structure
> 10. Manage Standard Operating Practices
> 11. Manage problem resolution process
> 12. Brief OSM leadership on IRMS/OSM connections, opportunities and risks
> 13. Manage OSMP financial processes.

10.2 Describe how changes in environmental Condition will be assessed *

> NA

10.3 Are There Benchmarks Being Used to Assess Changes in Environmental Condition? If So, Please Describe, If Not, State "NONE" *

> NA

(e.g., objectives, tiers, triggers, limits, reference conditions, thresholds, etc.)

10.4 Provide a Brief Description of the Western Science or Community-Based Monitoring Indigenous Community-Based Monitoring Methods by Project Phase *

> NA

10.5 List the Key Indicators Measured, If Not Applicable, State N/A *

NA

11.0 Knowledge Translation

In the space below, please provide the following:

- *Describe the plan for knowledge transfer and distribution of learnings from the project. This could include workshops, publications, best practice documentation, marketing plan, etc.*
- *Demonstrate that the knowledge transfer plan is appropriate for the intended end-users.*

This work plan supports all OSM workshops, Science Forums, product review and tracking process, and related knowledge translation mechanisms and projects.

12.0 External Partners

List by project or project phase each component that will be delivered by an external party (including analytical laboratories) and name the party. Describe and name the associate work plan/grant/contract for these services. * state none if not required

University of Calgary
Athabasca University
University of Alberta

*To ensure complete work plan proposal submission, all grants and contracts listed in this section should also be captured in Grants & Contracts.

13.0 Data Sharing and Data Management

For 2022-23 the following approach will be taken by the OSM Program related to data sharing.

For all work plans of a **western science** nature funded under the OSM Program, data sharing is a condition of funding and must align with the principle of **"Open by Default"**. In this case, all data is to be shared with the OSM Program as directed by the OSM Program Data Management work plan.

For all work plans involving **Indigenous Knowledge** as defined below and funded under the OSM Program, data sharing is a condition of funding and the Indigenous Knowledge components of the work plan must align with the principle of **"Protected by Default".** In this case, all data as defined as Indigenous Knowledge, are to be retained by the Indigenous community to which the Indigenous Knowledge is held.

Indigenous Knowledge is defined as:

"The knowledge held by First Nations, Inuit and Métis peoples, the Aboriginal peoples of Canada. Traditional knowledge is specific to place, usually transmitted orally, and rooted in the experience of multiple generations. It is determined by an Aboriginal community's land, environment, region, culture and language. Traditional knowledge is usually described by Aboriginal peoples as holistic, involving body, mind, feelings and spirit. Knowledge may be expressed in symbols, arts, ceremonial and everyday practices, narratives and, especially, in relationships. The word tradition is not necessarily synonymous with old. Traditional knowledge is held collectively by all members of a community, although some members may have particular responsibility for its transmission. It includes preserved knowledge created by, and received from, past generations and innovations and new knowledge transmitted to subsequent generations. In international or scholarly discourse, the terms traditional knowledge and Indigenous knowledge are sometimes used interchangeably."

This definition was taken from the Canadian Government's Tri-council Policy Statement for Ethical Research involving Humans (Chapter 9, pg. 113) and is an interim definition specific to the Oil Sands Monitoring Program.

Data Sharing and Data Management Continued

13.1 Has there, or will there be, a Data Sharing agreement established through this Project? *

NO

13.2 Type of Quantitative Data Variables**:**

Choose an item

13.3 Frequency of Collection:

Choose an item.

13.4 Estimated Data Collection Start Date:

Click or tap to enter a date.

13.5 Estimated Data Collection End Date:

Click or tap to enter a date.

13.6 Estimated Timeline For Upload Start Date:

Click or tap to enter a date.

13.7 Estimated Timeline For Upload End Date:

Click or tap to enter a date.

13.8 Will the data Include traditional knowledge as defined by and provided by an Indigenous representative, Community or Organization?

Choose an Item

TABLE 13.9 Please describe below the Location of Data and Data Type:
Add a Data Source by clicking on the table and then clicking on the blue "+" symbol on the bottom right side of table

Name of Dataset	Location of Dataset (E.g.: Path, Website, Database, etc.)	Data File Formats (E.g.: csv, txt, API, accdb, xlsx, etc.)	Security Classification
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Choose an item.

14.0 2023/24 Deliverables

Add an additional deliverable by clicking on the table and then clicking on the blue "+" symbol on the bottom right side of table.

Type of Deliverable	Delivery Date	Description
Other (Describe in Description Section)	Choose an item.	Ongoing support for Governance table administration and documentation
Other (Describe in Description Section)	Choose an item.	Program communications
Other (Describe in Description Section)	Choose an item.	Coordination of the OSM data portal and website (delivered by Service Alberta).
Other (Describe in Description Section)	Choose an item.	Ongoing development of materials and scientific content for Science Co-leads, Program Co-Chairs, TACs, SIKIC, ICBMAC and OC members
Other (Describe in Description Section)	Choose an item.	Coordination of the OSMP product review
Other (Describe in Description Section)	Choose an item.	Administation of the Problem Resolution process
Other (Describe in Description Section)	Choose an item.	Ongoing contract and grant management.
Other (Describe in Description Section)	Choose an item.	Implementation of the annual work planning process.
Other (Describe in Description Section)	Choose an item.	Click or tap here to enter text.

15.0 Project Team & Partners

In the space below please provide information on the following:

- *Describe key members of the project team, including roles, responsibilities and expertise relevant to the proposed project.*
- *Describe the competency of this team to complete the project.*
- *Identify any personnel or expertise gaps for successful completion of the project relative to the OSM Program mandate and discuss how these gaps will be addressed.*
- *Describe the project management approach and the management structure.*

Nora Abercrombie (Alberta Environment and Protected Areas) – Support Science Co-Leads and Program Co-Chairs to develop scientific content for the OSM program; deliver an approved annual monitoring plan; provide input into strategic decisions affecting program; facilitate consistency of approach to planning and integration across the program.

Yemi Ilesanmi (Alberta Environment and Protected Areas) - Support Science Co-Leads and Program Co-Chairs to develop scientific content for the OSM program; deliver an approved annual monitoring plan; provide input into strategic decisions affecting program; facilitate consistency of approach to planning and integration across the program; and, oversee the AEP OSM Science Secretariat.

TAC Coordinator (Existing Vacancy) (Alberta Environment and Protected Areas) – TAC coordinator, SoE report coordination, science and technical translation, secretariat support to the program.

Shilpa Yakubow/Backfill -- Integration Officer – (Alberta Environment and Protected Areas) – Lead integration processes, problem resolution, lead communications, process management, financial management.

Rosanne Gillespie (Secretariat Coordinator (Alberta Environment and Protected Areas) - Provide primary secretariat support to governance tables, financial management.

Joanne Wong/Cathy Mitchell (Alberta Environment and Protected Areas) -- Program Office Admin Assistant -- administrative support.

Carolyn Fox/Anna Curtner (Environment and Climate Change Canada) - Support Science Co-Leads and Program Co-Chairs to develop scientific content for the OSM program; deliver an approved annual monitoring plan; provide input into strategic decisions affecting program; facilitate consistency of approach to planning and integration across the program; and, oversee the ECCC OSM Science Secretariat.

Laura James/Shannon Degraaf-- (Environment and Climate Change Canada) - Provide secretariat support to the program

Pamela Johnson (Environment and Climate Change Canada) - Provide secretariat support to the program

16.0 Project Human Resources & Financing

Section 16.1 Human Resource Estimates

Building off of the competencies listed in the previous section, please complete the table below. Add additional rows as necessary. This table must include **ALL staff involved** in the project, their role and the % of that staff's time allocated to this work plan. The AEP calculated amount is based on an estimate of $120,000/year for FTEs. This number cannot be changed. The OSM program recognizes that this is an estimate.

Table 16.1.1 AEP

Add an additional AEP Staff member by clicking on the table and then clicking on the blue "+" symbol on the bottom right side of table. The total FTE (Full Time Equivalent) is Auto Summed (in Table 16.2.1) and converted to a dollar amount.

Name (Last, First)	Role	% Time Allocated to Project
Shilpa Yakubow	Integration Officer	100%
Existing Vacancy	TAC/SoE Coordination	100%
Rosanne Gillespie	Secretariat Coordinator	100%
Joanne Wong/Catthy Mitchell	Admin support	100%

Table 16.1.2 ECCC

Add an additional ECCC Staff member by clicking on the table and then clicking on the blue "+" symbol on the bottom right side of table. The total FTE (Full Time Equivalent) is Auto Summed in Table 16.2.2

Name (Last, First)	Role	% Time Allocated to Project
Laura James/ Shannon Degraaf	Secretariat support	100%
Pamela Johnson	Secretariat support	100%

The tables below are the financial tables for Alberta Environment & Parks (AEP) and Environment & Climate Change Canada. All work plans under the OSM Program require either a government lead or a government coordinator.

Section 16.2 Financing

The OSM Program recognizes that many of these submissions are a result of joint effort and monitoring initiatives. A detailed "PROJECT FINANCE BREAKDOWN" must be provided using the Project Finance Breakdown Template provided, accessible here (ctrl + click the link below). Please note that completion of this Project Finance Breakdown Template is mandatory and must be submitted along with each workplan.

PROJECT FINANCE BREAKDOWN TEMPLATE (CTRL+CLICK HERE)

Table 16.2.1 Funding Requested BY ALBERTA ENVIRONMENT & PARKS

Organization – Alberta Environment & Parks ONLY	Total % time allocated to project for AEP staff	Total Funding Requested from OSM
Salaries and Benefits *(Calculated from Table 16.1.1 above)*	**400.00%**	**$480,000.00**
Operations and Maintenance		
Consumable materials and supplies		$30,000.00
Conferences and meetings travel		$10,000.00
Project-related travel		$20,000.00
Engagement		$20,000.00
Reporting		$100,000.00
Overhead		$240,000.00
Total All Grants *(Calculated from Table 16.4 below)*		**$300,000.00**
Total All Contracts *(Calculated from Table 16.5 below)*		**$850,000.00**
Sub- TOTAL *(Calculated)*		**$2,050,000.00**
Capital*		$0.00
AEP TOTAL *(Calculated)*		**$2,050,000.00**

* The Government of Alberta Financial Policies (*Policy # A600*) requires that all **capital asset** purchases comply with governmental and departmental legislation, policies, procedures, directives and guidelines. **Capital assets** (*Financial Policy # A100*, Government of Alberta, January 2014) are tangible assets that: have economic life greater than one year; are acquired, constructed, or developed for use on a continuing basis; are not held for sale in ordinary course of operations; are recorded and tracked centrally; have a cost greater than $5,000.

Some **examples of capital asset equipment include:** laboratory equipment, appliances, boats, motors, field equipment, ATV's/snowmobiles, stationary equipment (pier/sign/weather), fire/safety equipment, pumps/tanks, heavy equipment, irrigation systems, furniture, trailers, vehicles, etc. (*Financial Policy # A100*, Government of Alberta, January 2014).

Table 16.2.2 Funding Requested BY ENVIRONMENT & CLIMATE CHANGE CANADA

Organization – Environment & Climate Change Canada ONLY	Total % time allocated to project for ECCC staff	Total Funding Requested from OSM
Salaries and Benefits FTE *(Please manually provide the number in the space below)*		
Salaries and Benefits		$285,763.00
Operations and Maintenance		
Consumable materials and supplies		$15,000.00
Conferences and meetings travel		$0.00
Project-related travel		$50,000.00
Engagement		$0.00
Reporting		$0.00
Overhead		$28,190.00
ECCC TOTAL *(Calculated)*		**$378,953.00**

* ECCC cannot request capital under the OSM program. Any capital requirements to support long-term monitoring under the OSM program should be procured by Alberta and captured in that budget table.

Table 16.3

Complete ONE table per Grant recipient.

Add a Recipient by clicking on the table and then clicking on the blue "+" symbol on the bottom right side of table. The total of all Grants is Auto Summed in Table 16.2.1

GRANT RECIPIENT - ONLY: Name	Fort McMurray Staging Area Lease
GRANT RECIPIENT - ONLY: Organization	WBEA
Category	**Total Funding Requested from OSM**
Salaries and Benefits	$0.00
Operations and Maintenance	
Consumable materials and supplies	$300,000.00
Conferences and meetings travel	$0.00
Project-related travel	$0.00
Engagement	$0.00
Reporting	$0.00
Overhead	$0.00
GRANT TOTAL *(Calculated)*	**$300,000.00**

Table 16.4

Complete ONE table per Contract recipient.

Add a Recipient by clicking on the table and then clicking on the blue "+" symbol on the bottom right side of table. This section is only to be completed should the applicant intend to contract components or stages of the project out to external organizations. The total of all Contracts is Auto Summed in Table 16.2.1

CONTRACT RECIPIENT - ONLY: Name	Click or tap here to enter text.
CONTRACT RECIPIENT - ONLY: Organization	Click or tap here to enter text.
Category	**Total Funding Requested from OSM**
Salaries and Benefits	$0.00
Operations and Maintenance	
Consumable materials and supplies	$0.00
Conferences and meetings travel	$0.00
Project-related travel	$0.00
Engagement	$0.00
Reporting	$0.00
Overhead	$0.00
CONTRACT TOTAL *(Calculated)*	**$0.00**
CONTRACT RECIPIENT - ONLY: Name	Third Party Review
CONTRACT RECIPIENT - ONLY: Organization	TBD multiple competitive contract/honoraria agreements
Category	**Total Funding Requested from OSM**
Salaries and Benefits	0
Operations and Maintenance	
Consumable materials and supplies	$750,000.00
Conferences and meetings travel	0
Project-related travel	$0.00
Engagement	0
Reporting	0
Overhead	0
CONTRACT TOTAL *(Calculated)*	**$750,000.00**
CONTRACT RECIPIENT - ONLY: Name	Communication/knowledge translation strategy
CONTRACT RECIPIENT - ONLY: Organization	TBD by competitive process
Category	**Total Funding Requested from OSM**
Salaries and Benefits	0
Operations and Maintenance	
Consumable materials and supplies	$100,000.00
Conferences and meetings travel	0
Project-related travel	0
Engagement	0

Reporting	0
Overhead	0
CONTRACT TOTAL *(Calculated)*	**$100,000.00**

Table 16.5 GRAND TOTAL Project Funding Requested from OSM Program

The table below is auto calculated, please do not try to manually manipulate these contents.

Category	Total Funding Requested from OSM
Salaries and Benefits *Sums totals for salaries and benefits from AEP and ECCC ONLY*	$765,763.00
Operations and Maintenance	
Consumable materials and supplies *Sums totals for AEP and ECCC ONLY*	$45,000.00
Conferences and meetings travel *Sums totals for AEP and ECCC ONLY*	$10,000.00
Project-related travel *Sums totals for AEP and ECCC ONLY*	$70,000.00
Engagement *Sums totals for AEP and ECCC ONLY*	$20,000.00
Reporting *Sums totals for AEP and ECCC ONLY*	$100,000.00
Overhead *Sums totals for AEP and ECCC ONLY*	$268,190.00
Total All Grants (from table 16.2.1 above) *Sums totals for AEP Tables ONLY*	$300,000.00
Total All Contracts (from table 16.2.1 above) *Sums totals for AEP Tables ONLY*	$850,000.00
Sub- TOTAL	$2,428,953.00
Capital* *Sums total for AEP*	$0.00
GRAND PROJECT TOTAL	$2,428,953.00

Some **examples of capital asset equipment include:** laboratory equipment, appliances, boats, motors, field equipment, ATV's/snowmobiles, stationary equipment (pier/sign/weather), fire/safety equipment, pumps/tanks, heavy equipment, irrigation systems, furniture, trailers, vehicles, etc. (*Financial Policy # A100*, Government of Alberta, January 2014).

17.0 FINANCIAL MANAGEMENT

The OSM Program reserves the right to reallocate project funding during the current fiscal year on the basis of project performance and financial overspend or underspend.

☒ *Please check this box to acknowledge you have read and understand*

In the space below please describe the following:

- *Discuss how potential cost overruns and cost underruns will be managed.*
- *If this is a continuing project from last year, identify if this project was overspent or underspent in the previous year and explain why.*
- *Describe what risks and/or barriers may affect this project.*

The costing estimate for the delivery of the third party, 5-year review of the Science and Indigenous Programs is estimated up to $444,000.00. This estimate is based on 8 expert panel members (5 Western Science and 3 Indigenous experts. A Chair will be appointed from the 8 panel members). Honoria rates are aligned with Ministerial Order 18/2022 used for EPA's Science Advisory Panel and Indigenous Wisdom Advisory Panel. These rates are in line with other GoA advisory panels of equivalent expertise. The cost estimate is based on:

1. Two face-to-face meetings of 6 h length each, plus preparation and travel expenses.
2. Two virtual meetings of 4 h length each, plus preparation.
3. 30 days x 8 h of review time. 30 days for the review is the same time length used in the 2016 Review.
4. Travel expenses are based on standard GoA rates and include airfare of $2000.
5. Administrative support from the University of Calgary for scheduling, meeting support etc is estimated at $15,000. This funding will be sourced from the existing grant and is not included in the total here.

Based on the above, up to approximately $306,000 will be used to fund the review of the governance and management system by a third party organization that specializes in these types of reviews. This review will go through a tender process.

18.0 Alternate Sources of Project Financing – In-Kind Contributions

Table 18.1 In-kind Contributions

Add an In Kind Contribution by clicking on the table and then clicking on the blue "+" symbol on the bottom right side of table.

DESCRIPTION	SOURCE	EQUIVALENT AMOUNT ($CAD)
Click or tap here to enter text.	Click or tap here to enter text.	$0.00

	TOTAL	$0.00

19.0 Consent & Declaration of Completion

Lead Applicant Name

Click or tap here to enter text.

Title/Organization

Click or tap here to enter text.

Signature

Click or tap here to enter text.

Date

Click or tap to enter a date.

Government Lead / Government Coordinator Name (if different from lead applicant)

Click or tap here to enter text.

Title/Organization

Click or tap here to enter text.

Signature

Click or tap here to enter text.

Date

Click or tap to enter a date.

PROGRAM OFFICE USE ONLY

Governance Review & Decision Process
this phase follows submission and triggers the Governance Review

TAC Review (Date):

Click or tap to enter a date.

ICBMAC Review (Date):

Click or tap to enter a date.

SIKIC Review (Date):

Click or tap to enter a date.

OC Review (Date):

Click or tap to enter a date.

Final Recommendations:
Decision Pool:

Choose an item.

Notes:

Click or tap here to enter text.

Post Decision: Submission Work Plan Revisions Follow-up Process
This phase will only be implemented if the final recommendation requires revisions and follow-up from governance

ICBMAC Review (Date):

Click or tap to enter a date.

SIKIC Review (Date):

Click or tap to enter a date.

OC Review (Date):

Click or tap to enter a date.

Comments:
Decision Pool:

Choose an item.

Notes & Additional Actions for Successful Work Plan Implementation:

Click or tap here to enter text.