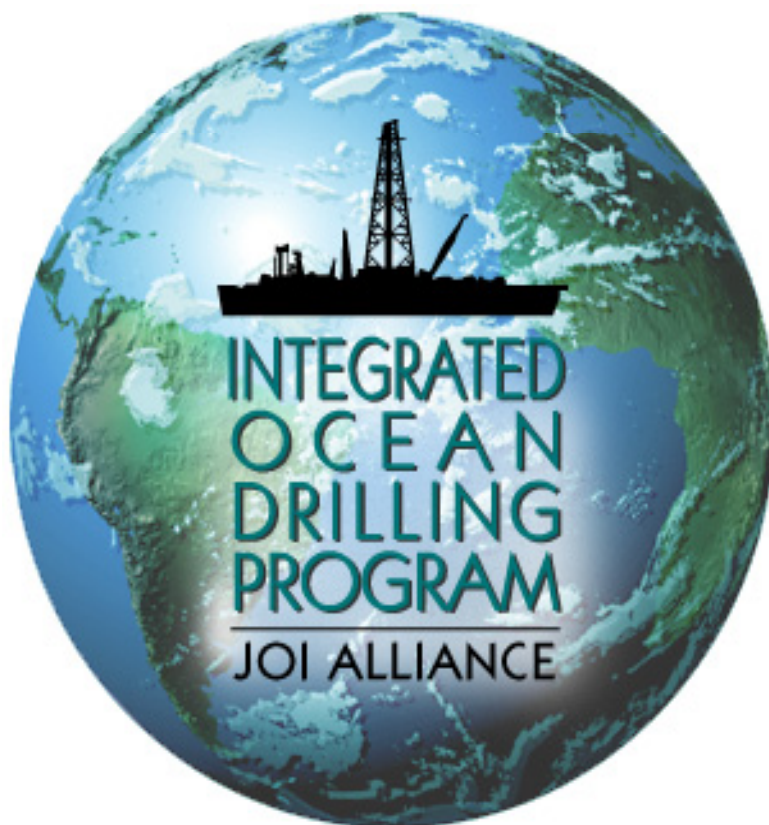


19 August 2004



1 April–30 June 2004

Quarterly Report 3

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Submitted by the JOI Alliance to

The National Science Foundation

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INTRODUCTION

The organization of this quarterly report reflects activities and deliverables that are outlined in the Integrated Ocean Drilling Program U.S. Implementing Organization (IODP-USIO) Program Plan as implemented by the JOI Alliance during the third quarter of FY04.

PHASE 1 MOBILIZATION ACTIVITIES

MOBILIZATION SCHEDULE

The *JOIDES Resolution* was accepted in Gamagori, Japan, at 1030 on 1 June 2004 effective 0000 1 June 2004. The ship left Gamagori at 1632 hr on 2 June 2004 to begin the transit to Astoria, Oregon. Mobilization was completed with the loading of tubulars and supplies in Astoria during a very successful port call in Astoria 20–27 June 2004.

STATUS OF EQUIPMENT

A satellite communication system contract was established with Rignet and very small aperture terminal (VSAT) satellite communication services were operational at the start of the transit to Astoria, Oregon. Although, the backhaul from Houston to IODP-USIO Science Services, Texas A&M University (TAMU), was not in place during the transit because of an unexpected labor strike at Southwestern Bell, full services were operational during the Astoria port call. The space segment total of 256 Kb is distributed 192 Kb to the JOI Alliance and 64 Kb to Transocean. Transocean has had hardware challenges with the ship's private branch exchange (PBX) system, resulting in lack of necessary capacity to host all of the shore voice circuits that were anticipated; ODL has agreed to service the PBX and add the required line cards.

During the transit, IODP-USIO Science Services, TAMU, technical staff reactivated the shipboard laboratories and computer networks and installed new computer equipment (desktops and peripherals).

IODP-USIO Science Services, Lamont-Doherty Earth Observatory (LDEO), technical staff reactivated the downhole measurements laboratory and associated computer systems; installed logging support equipment and a data acquisition system; and repaired telemetry cables. During the Astoria port call a new heave-compensated logging winch was installed. (During Expedition 301, the ODP wireline heave compensator will serve as a backup system. It will be removed after operational testing of the IODP system. Once removed, a full logging equipment workshop will be located in its place to create safer workshop environment for the logging engineer). Staff ensured that shipboard laboratory, data acquisition systems, and downhole tools were fully functional; bench tested downhole tools; and established all data links with the Schlumberger units.

INSURANCE RELATED TO JOI SUBCONTRACTS

IODP-USIO Science Services, LDEO, secured downhole tool insurance coverage in advance of Expedition 301 for both standard and special deployments.

HEALTH, SAFETY, AND ENVIRONMENT (HSE) PROCEDURES

The HSE document is under review and will be finalized at the upcoming June 2004 Environmental Protection and Safety Panel (EPSP) meeting. Mandatory annual inspection of radiation sources and radiation safety training for technical support staff was conducted by IODP-USIO Science Services, TAMU, HSE staff during the Expedition 301 port call in Astoria, Oregon.

ENVIRONMENTAL ASSESSMENT

The environmental assessment for Phase 1 was delivered electronically to the National Science Foundation (NSF) on 24 May 2004. At NSF's request, the USIO explored with the National Oceanic and Atmospheric Administration (NOAA) the possibility of obtaining a letter of authorization to allow the vertical seismic profile (VSP) experiment during Expedition 301. At a meeting with NOAA on 8 June 2004 in Washington, D.C., it was agreed that Joint Oceanographic Institutions, Inc. (JOI), on behalf of the JOI Alliance would submit a request for a NOAA letter of authorization to approve Phase 1 activities that are expected to result in zero take of marine mammals. The requested authorization would allow the USIO to proceed with VSPs and limited seismic surveys. The letter was submitted on 24 June 2004; a response is pending. Essential elements of the agreement with NOAA are that the USIO follow a formal procedure to minimize the disturbance of marine mammals during operations involving seismic sources as well as post observers and record sightings of marine mammals during these operations. During the initial transit and at the Expedition 301 port call in Astoria, Oregon, B. Julson (Supervisor of Technical Support at IODP-USIO Science Services, TAMU) conducted observer training for the technical support staff and the ship's officers.

A request for quotes (RFQ) for the Gulf of Mexico Hazard Assessment for Proposal 589-Full3 (P. Flemming) was issued on 12 March 2004. Two responses were received. J. Baldauf (Deputy Director of Science Services at IODP-USIO Science Services, TAMU) placed the award on hold because of budget constraints. On 25 June 2004, the lowest responsive bidder confirmed that the quote would remain valid, provided that there were no changes in the scope of work. Scheduling for this project will be reviewed after the USIO/TAMU budget review in July 2004.

EXPEDITION OPERATIONS

IODP-USIO EXPEDITION SCHEDULE

The IODP-USIO operational schedule was updated on 7 May 2004 following the IODP Management, Inc. (IODP-MI), Operations Committee (OPCOM) meeting in April 2004.

* Cruise*	Port (Origin)	Dates ^{1,2}	Total Days (Port/Sea)	Days at Sea (Transit ³ /Ops ⁴)	Co-Chief Scientists	Alliance Contacts
Transit	Gamagori, Japan	1 ⁴ -20 June 2004	19 (2/17)	17/0	N/A	N/A
Mobilization	Astoria	20-27 June	7 (7/0)	(0/0)	N/A	N/A
1 Juan de Fuca Hydrogeology	Astoria	27 June-21 August	55 (1/54)	2/52	Andrew Fisher Tetsuro Urabe	TAMU: A. Klaus LDEO: G. Iturrino
Costa Rica Hydrogeology/ Transit	Astoria	21 August-22 September	32 (1/31)	28/3	TBN	TAMU: M. Malone
2 North Atlantic Climate 1	St. John's, Newfoundland	22 September-14 November	53 (5/48)	5/43	James Channell Tokiyuki Sato	TAMU: M. Malone LDEO: S. Robinson

* Cruise*	Port (Origin)	Dates ^{1,2}	Total Days (Port/Sea)	Days at Sea (Transit ³ /Ops ⁴)	Co-Chief Scientists	Alliance Contacts
3 Oceanic Core Complex 1	Ponta Delgada	14 November 2004–5 January 2005	52 (5/47)	7/40	Chris MacLeod Barbara John	TAMU: D.J. Miller LDEO: F. Einaudi
4 Oceanic Core Complex 2	Ponta Delgada	5 January–27 February	53 (5/48)	7/41	Donna Blackman Yasuhiko Ohara	TAMU: D.J. Miller LDEO: H. Delius
5 North Atlantic Climate 2	Ponta Delgada	27 February–22 April	54 (5/49)	4/45	Rudiger Stein Toshiya Kanamatsu	TAMU: M. Malone LDEO: B. Rea
Transit	Reykjavik	22 April–10 May	18 (3/15)	15/0	N/A	N/A
Demobilization	Galveston	10 May–1 June	22 (22/0)	0/0	N/A	N/A

Notes:

Acceptance of the vessel will take place on 31 May 2004.

* Expedition nomenclature will be adjusted in the future to reflect naming protocols to be established by IODP-MI.

1 Ship is scheduled to arrive 0600 hr on first day of port call.

2 Initial cruise date reflects first day of port call; ship sails when ready.

3 Transit = estimated time to/from port to the operating area.

4 Ops = operations (includes both on-site and between-site times).

EXPEDITION PLANNING AND IMPLEMENTATION ACTIVITIES

EXPEDITION AND SITE NOMENCLATURE

IODP-MI directed the USIO that the Juan de Fuca expedition would be numbered as “Expedition 301” and would begin with “Site U1301.”

IODP-USIO EXPEDITION 301: JUAN DE FUCA

Expedition Implementation: Expedition 301, the first expedition of IODP, commenced on 27 June 2004 when the *JOIDES Resolution* departed Astoria, Oregon.

Clearance and Permitting Activities: Clearance for Expedition 301 activities was received from Canada on 7 June 2004. Submittal to NOAA of the request for a letter of authorization clears the way for the VSP scheduled for later in the expedition.

Expedition Staffing: Staffing of one schoolteacher (see “Education/Outreach” below) and one undergraduate student trainee was completed. T. Sugihara, a Center for Deep Earth Exploration (CDEX) Laboratory Officer, sailed as a member of the technical staff.

IODP-USIO EXPEDITION 301T: COSTA RICA HYDROGEOLOGY/TRANSIT

Expedition staffing: There will be one Chief Scientist (M. Kastner). Scientific staffing for science party has been completed. In addition to the principal investigator’s team of five (funded by M. Kastner), one Japan Drilling Earth Science Consortium (J-DESC) scientist and one European Consortium for Ocean Research Drilling (ECORD) scientist will participate. M. Malone will be the staff scientist. One Monterey Bay Area Research Institute (MBARI) engineer and two other observers will join the operation in Astoria, Oregon (funded by M. Kastner).

Clearance and permitting activities: An amended clearance request to allow installation of a long-term recording current meter was submitted to the U.S. State Department on 18 June 2004; a response is pending.

Precruise meeting: The precruise meeting was held on 19 May 2004 in College Station, Texas.

Technology: Modifications to the OsmoSampler recovery system are being designed and fabricated by an outside contractor at the expense of the principal investigator (M. Kastner).

IODP-USIO EXPEDITIONS 303 AND 306: NORTH ATLANTIC CLIMATE 1 AND NORTH ATLANTIC CLIMATE 2

Expedition Planning: Arrangements are being made for a weather/ice observer to sail on Expedition 303, as well as for daily weather reports from the Danish Meteorological Institute to be transmitted to the vessel. A marine contingency plan is being developed by Overseas Drilling Ltd. (ODL) to guide decision-making in the event that bad weather or ice conditions are encountered during the expeditions.

Pre-cruise Meeting: A joint pre-cruise meeting was held 3 and 4 June 2004 in College Station, Texas.

Expedition Staffing: The Staff Scientists for both expeditions have not been assigned. Scientific staffing for Expedition 303 has been completed. The science party will consist of eight participants each from the U.S. Science Support Program (USSSP), J-DESC, and ECORD, and one from IODP-China. Scientific staffing for Expedition 306 will begin in August.

Clearance and permitting activities: Clearance documents were submitted to the U.S. State Department on 27 February 2004; a response is pending. Clearance for the Norwegian Greenland Sea site will be obtained later this year.

Discussions continued with the Co-Chief Scientists regarding the logging plan for these cruises. OPCOM has endorsed a plan that will involve the logging of the Orphan Knoll site, with additional logging during Expedition 306 to be based on the results of Expedition 303 operations.

IODP-USIO EXPEDITIONS 304 AND 305: OCEANIC CORE COMPLEX 1 AND OCEANIC CORE COMPLEX 2

Pre-cruise Meeting: A joint pre-cruise meeting was held 4 and 5 May 2004 in College Station, Texas.

Expedition Staffing: The Staff Scientist for Expedition 304 has not been assigned. The Staff Scientist for Expedition 305 is D.J. Miller. Scientific staffing continued during the quarter (a second round of science party invitations was issued). Invitations have been issued to six USSSP, five J-DESC, and eight ECORD scientists for Expedition 304, and seven USSSP, six J-DESC, and eight ECORD scientists for Expedition 305.

Technology: Contract negotiations have been completed to secure the hammer drill system for use during Expedition 304. Discussions continued with the Co-Chief Scientists regarding the use of specialty tools during this expedition.

POST-IODP-USIO EXPEDITION 306 ACTIVITIES

At the June 2004 Science Planning Committee (SPC) meeting, NSF indicated that funds to extend FY05 and FY06 operations may become available and asked SPC to take this into account in ranking proposals for future drilling. As a result, 14 proposals will be forwarded to OPCOM for consideration at the October 2004 meeting. Project A's (feasibility, time, and cost

estimates) for each component of each proposal will have to be prepared by 25 September 2004. This project is in progress.

TECHNOLOGY DEVELOPMENT

PROJECTS AND OTHER ACTIVITIES

ENGINEERING SOFTWARE

Work was in progress to create redefined engineering standards, based on excerpts from a manual for industry drawing standards.

RIG INSTRUMENTATION SYSTEM (RIS)

The RIS system was reinstalled for Expedition 301 (no upgrades, but an attempt was made to improve the ruggedness of the electronics).

IODP-USIO SCIENCE SERVICES, TAMU, ENGINEERING SERVICES

Dead Weight Tester: Research continues into a dead weight tester for calibrating pressure transducers.

Drilling Sensor Sub (DSS): One DSS was recalibrated.

Information Management: New mechanical design software was purchased that includes product database management software to control and manage information, drawings, specifications or manuals, and procedures. Solidworks software was purchased, and training was scheduled for July 2004.

Instrumented Water Sampler (IWS): L. Chen (Electrical Engineer) worked on new software debugging feedback control software to speed tool development in FY05.

Shore-based Test Facility: All parts except instrumentation are on order for the Simulated Borehole Test Facility (SBTF) and will be delivered in early August 2004. Instrumentation will be ordered in the fourth quarter of FY04.

System Support: Two sets of weight on bit fluctuation (WOBF) electronics and a doghouse laptop were shipped to the Astoria, Oregon, port call. One advanced piston corer temperature (APCT) tool assembly (electronics and heat flow shoe hardware), one spare electronics, one laboratory interface box, one laptop computer, and miscellaneous spares were prepared for shipment to the British Geological Survey (BGS) for use during Expedition 302.

IODP-USIO SCIENCE SERVICES, TAMU, ANALYTICAL SERVICES

Information Management: The development of a Laboratory Information Management System (LIMS) is in progress. The first deliverable (a database of all analytical systems and the first Web-based data access) is expected to be released for Expedition 303.

Shore-based Laboratory: Staff members evaluated the X-ray fluorescence (XRF) spectrometer that was on the *JOIDES Resolution* until 2002 for potential use on shore. The TAMU Physical Plant provided a revised cost estimate for repository and laboratory expansions in the Gulf Coast Repository (GCR) (walls, air conditioning, power/water/air supplies, etc.).

Systems Support: Modifications to hardware and software were undertaken for deployment of a second core logger (a customized Geotek Multi Sensor Core Logger) on Expeditions 303 and 306. The purchase of product database management software has been delayed to evaluate the requirement for a dedicated server. Janus-to-Java migration of the Corelog application is in final test phase. Development of a digital microimages management system is in the design phase.

Drilling Sensor Sub (DSS) and Core Barrel–Retrievable Memory Module (CB-RMM): See “IODP-USIO Science Services, LDEO, Engineering and Technical Services” below for an update on this joint project.

IODP-USIO SCIENCE SERVICES, LDEO, ENGINEERING AND TECHNICAL SERVICES

DSS and CB-RMM: Testing of TAMU’s wireless telemetry equipped DSS and LDEO’s CB-RMM was completed on 13 May 2004 at the APS facility in Cromwell, Connecticut. The objective was to ensure that the modified DSS could communicate wirelessly with the existing CB-RMM and that sensor outputs were accurate. All objectives were successfully achieved.

Engineering Development: Construction is proceeding on new fabrication and testing facilities required to house state-of-the-art workshops and equipment. It is expected that this construction project, funded by LDEO, will be completed by the end of August.

INFORMATION TECHNOLOGY

SHIP-TO-SHORE COMMUNICATION STRATEGY

A new communications policy was written by JOI Alliance staff for planned dissemination on Expedition 301 in early July 2004.

INVENTORY MANAGEMENT SYSTEM

An request for proposals (RFP) for a new inventory management system was prepared in May 2004; however, funding for the project was put on hold shortly thereafter.

REPORTS/PUBLICATIONS

IODP-USIO PROGRAM PLAN FOR IODP-MI AND NSF

A draft version of the FY05 Program Plan was submitted to IODP-MI on 26 May 2004. A revised version was submitted to IODP-MI on 14 June 2004. The Phase 2 planning appendix is being finalized for inclusion in the August 2004 NSF submission.

USIO-IODP FY04 IODP QUARTERLY REPORT

The report for the second quarter of FY04 (January–March) was submitted to NSF on 20 May 2004.

IODP SCIENTIFIC PUBLICATIONS

SCIENTIFIC PROSPECTUS

Expedition 301 (Juan de Fuca Hydrogeology): Published on 26 May 2004 (see “Appendix I”).

Expedition 301T (Costa Rica Hydrogeology): Written, produced, and sent to IODP-MI for review in June 2004. Publication is expected in August 2004.

Expeditions 303 and 306 Scientific Prospectus (North Atlantic Climate): Writing and production are under way. IODP-MI review and publication are expected in July 2004 and August 2004, respectively.

Expeditions 304 and 305 (Oceanic Core Complex Formation, Atlantis Massif): Written, produced, and sent to IODP-MI for review in June 2004. Publication is expected in August 2004.

IODP LEGACY REPORTS

The JOI Alliance has begun the development of the list of legacy documents that will be maintained by the IODP-USIO during the program.

EDUCATION/OUTREACH

EDUCATION

TEACHER AT SEA INITIATIVE

In May 2004, J. Rice was selected to participate on Expedition 301 as the first IODP-USIO teacher at sea. On 21 and 22 June 2004, he attended a precruise orientation at LDEO, under the guidance of G. Iturrino (Logging Staff Scientist), who will act as his mentor during the expedition. Rice will develop laboratory fact sheets for teachers and middle/high school students and produce a journal documenting his experience. All materials will be posted on the IODP-USIO Web site.

HISTORICALLY BLACK COLLEGES AND UNIVERSITIES FELLOWSHIP PROGRAM

The JOI Alliance deadline for submitting fellowship proposals was 1 June 2004. The four proposed projects are

- Making Microfossils More Memorable; Alliance Mentor: John Firth, Curator, IODP-USIO Science Services, TAMU.
- Populating DSDP/ODP Logging Database Toward Keyword Searches; Alliance Mentor: Mary Reagan, Deputy Director, IODP-USIO Science Services, LDEO.
- Scientific Ocean Drilling Research in the Public Affairs and Media Relations Arena; Alliance Mentor: Kasey White, JOI Director of Public Affairs.
- Evaluation and Development of Educational Materials Utilizing Scientific Ocean Drilling; Alliance Mentor: Leslie Peart, JOI Education Coordinator.

IODP-USIO WEB SITE

The JOI Alliance Web administrators met on 5 May 2004 in Washington, D.C., to review the USIO Web site and develop a strategy for aligning the JOI, LDEO, and TAMU IODP-USIO content. Site redevelopment progressed in late May and June 2004. Katerina Petronotis (IODP-USIO Science Services, TAMU, Web Administrator) prepared templates for revised JOI Alliance Web pages, which were distributed to JOI and IODP-USIO Science Services, LDEO, Web administrators in June 2004.

On 14 June 2004, a JOI Alliance Intranet site was established to house staff resources, meeting minutes, policies, calendars, etc. This site is only accessible to JOI alliance staff members.

PUBLIC AFFAIRS

CONGRESSIONAL OUTREACH

On 15 April 2004, Adam Klaus, Ann Klaus, and A. Moy (IODP-USIO Science Services, TAMU) represented IODP-USIO at a special event honoring U.S. Sen. K.B. Hutchison (R-Texas) that took place in the George Bush Library at TAMU. A booth illustrating IODP-USIO Phase 1 activities was prepared for the event.

In June 2004, JOI participated in the Coalition for National Science Funding exhibit. Members of Congress and their staffs learned about the types of research that NSF supports, including IODP.

PUBLIC RELATIONS MATERIALS

An IODP-USIO brochure was published in May 2004 and was distributed at the Expedition 301 port call events as well as to the IODP-MI and other IODP implementing organization offices.

PORT CALL EVENTS

P. Rumford (Superintendent, Gulf Coast Repository, IODP-USIO Science Services, TAMU), M. Cortes (Senior Program Associate, JOI), and R. Deavers (Public Affairs Specialist, JOI) planned a VIP/media event and arranged tours for the Expedition 301 port call on 25 June 2004. At the VIP/media event in the morning, S. Bohlen (President, JOI) and J. Baldauf (Deputy Director of Science Services, IODP-USIO Science Services, TAMU) provided introductory remarks and Co-Chief A. Fisher gave a talk. Three representatives from Oregon State University, one congressional staff member, and local Oregon reporters/photographers attended. One article was published in the Astoria, Oregon, newspaper. A total of 73 people participated in tours in the afternoon.

PRODUCTS

The IODP-USIO produced T-shirts, fleece jackets, baseball hats, and coffee mugs before Expedition 301 sailed; these will be available for sale to expedition participants. The product graphics, which were not platform specific, were shared with the IODP-MI office and other implementing organizations.

IODP-USIO SUPPORT ACTIVITIES

INTERACTIONS WITH IODP-MI AND IODP IMPLEMENTING ORGANIZATIONS

IODP-MI AND IODP IMPLEMENTING ORGANIZATIONS MEETING

A meeting of IO representatives took place on 11 June 2004 at the Japan Marine Science and Technology Center (JAMSTEC) offices in Tokyo. Topics discussed included the organization of each implementing organization, possibilities for publishing engineering site survey data as technical reports, HSE training, staff exchanges among the implementing organizations, routine reports from the platforms (daily, weekly, etc.), cruise evaluations, and cruise staffing issues.

IODP-MI EDUCATION AND OUTREACH TASK FORCE

Ann Klaus (Deputy Director of Data Services at IODP-USIO Science Services, TAMU) attended the first IODP-MI Education and Outreach Task Force meeting on 17 and 18 May 2004 at the

IODP-MI office in Washington, D.C. After the meeting, the task force worked on creation of short descriptions of IODP to be used in public relations publications. A final version has not been distributed by IODP-MI.

APPENDIX A: CONTRACTUAL ACTIVITIES

JOI

JOI CONTRACT WITH NSF OCE-0352500

JOI received the following modifications during the report period:

- Modification 3: provided \$10 million in funding through 24 April 2004.
- Modification 4: provided \$2.7 million in funding through 30 September 2004.
- Modification 5: authorized NSF indemnification for U.S. IODP drilling vessels.

JOI SUBCONTRACT WITH TAMRF JSC 4-02

TAMRF sent a letter to JOI on 7 May 2004 regarding the IODP-USIO deficit and requested to transfer ODP funds to offset the deficit.

JOI issued the following modifications during the report period:

- Modification 1: approved FY04 Program Plan and incremental funding.
- Modification 2: provided incremental funding and incorporated the NSF indemnification clause, which indemnifies JOI and TAMRF as well as the drillship subcontractor for Phase 1, Overseas Drilling Limited (reference the 13 January 2004 request letter to JOI).

TAMRF submitted the first FY04 294 (Small Business Report) to JOI on 29 April 2004. Monitoring of the progress toward the stated goals in the Small Business Plan and identifying small and small and disadvantaged vendors is ongoing. A memo will be submitted to the IODP-USIO Science Services, TAMU, departments with lists of prequalified small and small and disadvantaged businesses that must be included on bid lists. In some instances, the department will be directed to procure goods/services from a specific vendor.

JOI SUBCONTRACT WITH LDEO JSC 4-03

JOI issued the following modification during the report period:

Modification 2: provided funding for activities through 30 September 2004.

LDEO

LDEO SF 294 SMALL BUSINESS REPORT

LDEO submitted the SF 294 Small Business Report to JOI on 3 May 2004.

Subcontract negotiations were under way between LDEO and Schlumberger, University of Leicester, University of Aachen, Ocean Research Institute, and Naturalia & Biologia.

TAMRF/TAMU

TAMRF SUBCONTRACT WITH ODL

TAMRF negotiations with ODL for IODP Phase 1 were conducted in the first half of the quarter. An ODL/TAMRF Letter Agreement for Phase 1 Operations was signed on 28 May 2004, and the TAMRF/ODL Phase 1 Subcontract was effective 10 June 2004. A modification will be forwarded to incorporate the NSF indemnification when the TAMRF/JOI Subcontract modification containing the indemnification is fully executed.

CONTRACTS/PROCUREMENT ACTIVITY (\$100,000 OR GREATER)

The following purchase orders were issued:

- Exmar Offshore Company for \$103,320 for an assessment of the market survey and invitation to tender (ITT) responses vs. cost and scientific priorities.
- Rignet Inc. for \$104,480 for the VSAT communication system for Phase 1.
- SDS Digger Tools, Ltd., for \$128,290 for hammer drill rental for Expedition 304 and the option to extend for Expedition 305 (no costs have been encumbered for Expedition 305).

OTHER CONTRACTS/PROCUREMENT ACTIVITY

Visa Corporate Purchasing cards (i.e., credit cards) will be distributed on a limited basis to staff outside of the Administrative Services Department within IODP-USIO Science Services, TAMU. This action will give departments more flexibility in making small dollar purchases not requiring purchase orders. Policies and procedures have been developed by Administrative Services and will be distributed to “departmental buyers.” The supervisors of Accounts Payable/Accounts Receivable and Procurement will then conduct training classes.

PROPERTY ACTIVITY

TAMRF’S annual inventory of NSF reportable property on shore began on 1 June 2004 and will conclude on 31 August 2004. NSF reportable property located on the ship was inventoried during the Expedition 301 port call. All NSF reportable property (on ship and shore) will have tags referring to the Ocean Drilling Program removed and replaced with new tags stating that the item is U.S. government property.

An agreement has been entered into with TAMRF and BGS for the loan of grade 2 drill pipe and electronics for the APCT tool. Property being loaned will be used in support of the IODP Expedition 302 drilling operations being conducted in the Arctic by the ECORD Science Operator.

APPENDIX B: FINANCE REPORT

Please contact info@joiscience.org for hard copies of the financial pages.

APPENDIX C: PERSONNEL STATUS

JOI

The following positions were filled during the quarter:

- Associate Director, Ocean Drilling Programs (M. Kleinrock): 19 April 2004
- Assistant Director, Ocean Drilling Programs (K. Kryc): 1 June 2004

LDEO

The following position was opened and advertised during the quarter:

- Logging Scientist, Borehole Research Group

The following position was filled during the quarter:

- Electrical Engineer (W. Keogh): 5 May 2004

TAMU

The following positions opened and were advertised during the quarter:

- Assistant Research Specialist/Staff Assistant (2)
- Budget Analyst, TAMRF
- Publications Specialist/Yeoperson
- Staff Scientist (2)
- Research Associate/Operational Superintendent
- Research Assistant/Marine Laboratory Specialist (6)
- Travel Disbursement Specialist, TAMRF

The following positions were filled or frozen during the quarterly period:

- Administrative Assistant (B. Riggs-Turner): 3 May 2004
- Assistant Research Specialist/Staff Assistant: Frozen
- Budget Analyst (C. Hughes): 17 May 2004
- Imaging Specialists (S. Housley and W. Crawford): 12 April 2004
- Marine Computer Specialist (P. Clark): 29 May 2004
- Research Assistant/Marine Laboratory Specialist (six filled): (L. Brandt, P. Kannberg, H. Paul, and P. Ténrière) 29 May 2004; (S. Prinz) 22 June 2004; and (T. Cobine) 25 June 2004.
- Supervisor of Operational Support (M. Storms): 1 April 2004
- Travel Disbursement Specialist (S. Rogers): 21 June 2004

APPENDIX D: CONFERENCE AND MEETING SCHEDULE*

Conference/Meeting	Date	Location
National Science Teachers Association (NSTA) Conference	1–4 April 2004	Atlanta, GA
Operations Committee (OPCOM)	15–16 April 2004	Washington, DC
Linux Conference	21–24 April 2004	San Diego, CA
European Geosciences Union (EGU) Meeting	25–30 April 2004	Nice, France
Offshore Technology Conference (OTC)	3–6 May 2004	Houston, TX
IODP-MI Education and Outreach Task Force Meeting	17–18 May 2004	Washington, DC
Science Steering and Evaluation Panels (SSEPs): Environmental Science Steering and Evaluation Panel (ESSEP) and Interior Science Steering and Evaluation Panel (ISSEP)	17–20 May 2004	Granada, Spain
Science Planning Committee (SPC)	14–17 June 2004	Yokohama, Japan
IODP Implementing Organization (IO) Meeting	8–12 June 2004	Tokyo, Japan
Environmental Protection and Safety Panel (EPSP)	21–22 June 2004	College Station, TX
Scientific Measurements Panel (SciMP)	23–25 June 2004	Boston, MA
Technical Advisory Panel (TAP)	29 June–1 July 2004	Nagasaki, Japan

* External meetings and conferences.

APPENDIX E: TRAVEL*

Institution	Personnel	Purpose	Date	Location
JOI	S. Bohlen, F. Rack	JOI Alliance Managers Meeting	1–2 April 2004	College Station, TX
JOI	F. Rack	NSTA Conference	2–3 April 2004	Atlanta, GA
JOI	F. Rack	OPCOM Meeting	15–16 April 2004	Washington, DC
JOI	M. Kleinrock	SSEPs Meeting	16–21 May 2004	Granada, Spain
JOI	F. Rack	IO Meeting	8–12 June 2004	Tokyo, Japan
JOI	F. Rack	SPC Meeting	13–18 June 2004	Yokohama, Japan
JOI	K. Kryc	SciMP Meeting	22–26 June 2004	Boston, MA
JOI	S. Bohlen, M. Cortes	Expedition 301 Port Call	23–27 June 2004	Astoria, OR
JOI	K. Kryc	TAP Meeting	26 June–2 July 2004	Nagasaki, Japan
LDEO	D. Goldberg	JOI Alliance Managers Meeting	1–2 April 2004	College Station, TX/
LDEO	D. Goldberg, M. Reagan	OPCOM Meeting	15–16 April 2004	Washington, DC
LDEO (LGHF)	F. Einaudi, P. Pezard	EGU Meeting	25–29 April 2004	Nice, France
LDEO (LGHF)	F. Einaudi	Expeditions 304 and 305 Precruise Meeting	1–7 May 2004	College Station, TX
LDEO	D. Goldberg, M. Reagan, G. Myers	JOI Alliance Team Leader Meeting	3 May 2004	Washington, DC
LDEO	M. Reagan, K. Nagao	JOI Alliance Web Administrators Meeting	4 May 2004	Washington, DC
LDEO	D. Quoidbach	JOI Alliance JIT Team Meeting	5 May 2004	Washington, DC
LDEO	W. Keogh, W. Masterson	DSS and CB-RMM Testing	13 May 2004	Cromwell, CT
LDEO	G. Myers, G. Guerin, S. Robinson	Downhole Tools Workshop	24–25 May 2004	Washington, DC
LDEO	G. Myers	JOI Alliance Platform Team/MREFC Meeting	26–27 May 2004	Washington, DC
LDEO	D. Goldberg	JOI Alliance Platform Team/MREFC Meeting	27 May 2004	Washington, DC
LDEO	G. Myers, G. Guerin	JOIDES Resolution Mobilization–Transit	29 May 2004	Gamagori, Japan

Institution	Personnel	Purpose	Date	Location
LDEO	S. Robinson	Expeditions 303 and 306 Precruise Meeting	2–5 June 2004	College Station, TX
LDEO	D. Goldberg	IO Meeting	8–12 June 2004	Tokyo, Japan
LDEO	W. Keogh, W. Masterson	<i>JOIDES Resolution</i> Mobilization–Port Call	19–27 June 2004	Astoria, OR
LDEO	D. Goldberg	EPSP Meeting	21–22 June 2004	College Station, TX
LDEO	S. Robinson	SciMP Meeting	22–25 June 2004	Boston, MA
LDEO	G. Myers	TAP Meeting	26 June–2 July 2004	Nagasaki, Japan
TAMU	Ann Klaus	NSTA Conference	1–4 April 2004	Atlanta, GA
TAMU	R. Dixon	Spir Star, Inc., Meeting	1 April 2004	Houston, TX
TAMU	D. Schroeder, M. Storms	Cabett Engineering Meeting	6 April 2004	Houston, TX
TAMU	K. Grigar	DSS Testing	7–30 April 2004	Cromwell, CT
TAMU	D. Schroeder, R. Dixon, M. Storms	Expedition 301 Planning Meeting at MBARI	8–10 April 2004	Monterey, CA
TAMU	D. Fackler	Management Training	12–17 April 2004	Ottawa, ON, Canada
TAMU	R. Dixon	C&M Machine Shop	13 April 2004	Navasota, TX
TAMU	P. Thompson	Software Conference	14–16 April 2004	Ft. Worth, TX
TAMU	J. Fox, J. Baldauf	OPCOM Meeting	15–16 April 2004	Washington, DC
TAMU	R. Dixon	C&M Machine Shop	21 April 2004	Navasota, TX
TAMU	E. Dillard	Training	21–24 April 2004	Chicago, MI
TAMU	D. Becker, J. Davis	Linux Conference	21–24 April 2004	San Diego, CA
TAMU	E. Pollard	Drill-in-Liner Testing	29 April 2004	Houston, TX
TAMU	Y. Yao, D. Kannoju	Oracle DBA Training	2–8 May 2004	Washington, DC
TAMU	B. Jonasson	OTC Conference	3 May 2004	Houston, TX
TAMU	D. Schroeder	TAM Meeting	3 May 2004	Houston, TX
TAMU	J. Baldauf,	JOI Alliance Team Leader Meeting	3–5 May 2004	Washington, DC
TAMU	J. Fox	JOI Alliance Team Leader Meeting	4–5 May 2004	Washington, DC
TAMU	D. Becker, Ann Klaus	JOI Alliance Team Leader Meeting; Web Administrators Meeting; JIT Meeting	3–7 May 2004	Washington, DC
TAMU	K. Petronotis	JOI Alliance Web Administrators Meeting; USIO/TAMU Web Committee Meeting	4–7 May 2004	Washington, DC; College Station, TX
TAMU	B. Lancaster	JOI Alliance Platform Team/MREFC Meeting	5–9 May 2004	Washington, DC
TAMU	P. Thompson	Meeting with Vendors	6 May 2004	Houston, TX
TAMU	A. Abraham, L. Chen	OTC Conference	6 May 2004	Houston, TX
TAMU	M. Storms	Meeting	6 May 2004	Houston, Texas
TAMU	R. Dixon	TAM Meeting	11 May 2004	Houston, TX
TAMU	B. Jonasson	Weatherford and Cameron Meeting	11 May 2004	Houston, TX
TAMU	W. Miles	Delivery of Freight	14 May 2004	Houston, TX
TAMU	D.J. Miller	SSEP Meeting	14–21 May 2004	Granada, Spain
TAMU	R. Mitchell	<i>JOIDES Resolution</i> Mobilization	18–19 May 2004	Houston, TX
TAMU	R. McGehee, L. McKnight	Delivery of Freight	19 May 2004	Houston, TX
TAMU	R. Dixon	C&M Meeting	20 May 2004	Navasota, TX
TAMU	M. Throne	Delivery of Freight	20 May 2004	Houston, TX
TAMU	M. Malone, D.J. Miller	SSEP Meeting	14–21 May 2004	Granada, Spain
TAMU	L. Obee	<i>JOIDES Resolution</i> Mobilization	22 May–5 June 2004	Gamagori, Japan

Institution	Personnel	Purpose	Date	Location
TAMU	R. Dixon, D. Schroeder, D. Ferrell	IODP Downhole Tools Workshop	23–27 May 2004	Washington, DC
TAMU	T. Davies	JOI Alliance Platform Team Meeting	24–28 May 2004	Washington, DC
TAMU	J. Fox, J. Baldauf, B. Jonasson	JOI Alliance Platform Team/MREFC Meeting	25–29 May 2004	Washington, DC
TAMU	R. McPherson, R. Davis	<i>JOIDES Resolution</i> Mobilization	28 May–7 June 2004	Gamagori, Japan
TAMU	J. Baldauf, R. Davis	<i>JOIDES Resolution</i> Mobilization	29 May–3 June 2004	Gamagori, Japan
TAMU	P. Clark	Expedition Transit	28 May–23 June 2004	Gamagori, Japan
TAMU	J. Eastlund	Expedition Transit	28 May–28 June 2004	Gamagori, Japan
TAMU	D. Ferrell, C. Bennight	Expedition Transit	29 May–24 June 2004	Gamagori, Japan
TAMU	D. Houpt	Expedition Transit	29 May–26 June 2004	Gamagori, Japan
TAMU	P. Ténrière	Expedition Transit	29 May–27 June 2004	Gamagori, Japan
TAMU	R. Dixon	C&M Meeting	1 June 2004	Navasota, TX
TAMU	B. Jonasson	Subsea and EXMAR Meeting	2 June 2004	Houston, TX
TAMU	P. Blum, R. Mithal	Database Workshop at JOI	2–4 June 2004	Washington, DC
TAMU	R. Dixon	RIKMAR and C&M Machine Shop Meeting	3 June 2004	Navasota, TX
TAMU	B. Jonasson, J. Baldauf, T. Davies, L. Schulze, B. Lancaster	JOI Alliance Platform Team/MREFC Meeting	6–8 June 2004	Washington, DC
TAMU	L. Chen	Matlab Training	8–13 June 2004	Seattle, WA
TAMU	J. Baldauf, T. Davies	IO Meeting	9–12 June 2004	Tokyo, Japan
TAMU	K. Grigar	Cabett Meeting	10 June 2004	Houston, TX
TAMU	J. Baldauf	SPC Meeting	13–18 June 2004	Yokohama, Japan
TAMU	R. Mitchell	<i>JOIDES Resolution</i> Mobilization	14–29 June 2004	Astoria, OR
TAMU	B. Goll	ORACLE91: Advanced PL/SQL Training	14–18 June 2004	Boston, MA
TAMU	R. Davis	<i>JOIDES Resolution</i> Mobilization	15–30 June 2004	Astoria, OR
TAMU	B. Jonasson	EXMAR and Maritime Hydraulics Meeting	17 June 2004	Houston, TX
TAMU	R. McPherson, J. Fox, J. Baldauf, Ann Klaus	Expedition 301 Port Call	18–25 June 2004	Astoria, OR
TAMU	J. Baldauf	EPSP Meeting	21–22 June 2004	College Station, TX
TAMU	B. Goll	ORACLE91: Advanced PL/SQL Training	21–24 June 2004	San Francisco, CA
TAMU	K. Johnson	Benefits Enrollment–Port Call	21–26 June 2004	Astoria, OR
TAMU	R. Dixon	TAM Meeting	22 June 2004	Houston, TX
TAMU	V. Day	Financial Training	22–25 June 2004	Denver, CO
TAMU	P. Blum	SciMP Meeting	22–25 June 2004	Boston, MA
TAMU	J. Salsman	Training	22–25 June 2004	Astoria, OR
TAMU	B. Jonasson	EXMAR Meeting	29 June 2004	Houston, TX

* Travel associated with meetings, conferences, port call work, and nonroutine sailing activities.

APPENDIX F: DATA REQUESTS

No activity.

APPENDIX G: SAMPLE REQUESTS

No activity.

APPENDIX H: PUBLICATIONS

Publication	Release Date	URL
<i>Scientific Prospectus:</i>		
Expedition 301 (Juan de Fuca Hydrogeology)	26 May 2004	http://iodp.tamu.edu/publications/SP/301SP/301SP.html

APPENDIX I: WEB

JOI

No user statistics available.

LDEO

No user statistics available.

TAMU

The number of visitors (each visit to the site by a viewer) viewing the IODP-USIO Science Services, TAMU, Web site increased from 2,242 in January 2004 to 10,736 in June 2004. Page views (views to specific documents) increased from 5,194 in January 2004 to 40,066 in June 2004.

APPENDIX J: CORE REPOSITORY CONSOLIDATION

IODP-USIO Sciences Services, TAMU, is awaiting approval of the Deep Sea Drilling Project (DSDP)/ODP Core Repository Consolidation Plan by the Science Planning and Policy Oversight Committee (SPPOC) before submitting the plan to NSF. Building options for an expanded facility were reviewed by TAMU.

APPENDIX K: MAJOR RESEARCH EQUIPMENT AND FACILITIES CONSTRUCTION (MREFC) ACCOUNT—U.S. SCIENTIFIC OCEAN DRILLING VESSEL (SODV) PROJECT

U.S. SODV PROJECT MONTHLY REPORT—JUNE 2004

During the reporting period (1 April–30 June 2004), the JOI Alliance Platform Team (comprising JOI: F. Rack, M. Kleinrock, K. Kryc; IODP-USIO Science Services, TAMU: J. Baldauf, T. Davies, B. Jonasson; IODP-USIO Science Services, LDEO: G. Iturrino, G. Myers) prepared for tasks that need to be accomplished in July–September 2004. These activities are summarized below. The major accomplishments were as follows:

- Initiating review of the market survey and invitation to tender (ITT) requests for information that were received in the previous period.

- Continuing planning for obtaining input from the broad scientific community regarding onboard science capabilities and habitability specifications for the U.S. Scientific Ocean Drilling Vessel (SODV).
- Developing drafts of design documents to support the aforementioned interactions with the science community and other stakeholders.
- Developing an outline and substantial content material (both technical and contractual) for the SODV RFP.

MARKET SURVEY AND INVITATION TO TENDER STATUS

During the quarter, the responses that were received from market survey and ITT solicitations were reviewed separately for technical and business aspects of each response. The responses will be used to guide the development of the U.S. SODV RFP.

EXMAR Offshore Company was contracted to perform an integrated assessment summarizing and evaluating responses to the market survey and ITT. As part of this assessment, they will compile data tables of the drilling equipment proposed by the vendors and drilling contractors and data tables summarizing information about potential drillships that may be offered by the drilling contractors. They will also evaluate, assess, and summarize findings and conclusions regarding the vessel systems and subsystems.

The EXMAR report will be delivered in July 2004 and is expected to address the responses in light of the scientific objectives and priorities outlined in the Conceptual Design Committee (CDC) report and the associated target sections, as well as considering cost/benefit analyses. The following will be included:

- Conclusions and recommendations
- Summary of science priorities from CDC report
- Data summary tables on drillship and vendor drilling equipment
- Vendor drilling equipment assessment
- Vessel evaluation
- Drill string options
- General cost trade-offs

U.S. SODV RFP

The U.S. SODV RFP is planned to be issued by 31 August 2004. The following tentative outline for the RFP table of contents was developed:

- Transmittal letter
- Acknowledgment of RFP response
- Statement of principles
- Instruction to contractors
- Commercial information
- Contract information
- Technical information

- Staffing (technical review)
- Scientific requirements
- Habitability
- Project management/control
- Engineering design phase
- Drilling equipment
- Hull and machinery package
- Health, safety and environmental (HSE) requirements
- Quality assurance/quality control–project management
- Logging package
- Timeline
- Response tables for technical specifications

ACTIVITIES OF THE JOI ALLIANCE PLATFORM TEAM

The IODP-USIO JOI Alliance Platform Team has expanded to include the following: JOI: F. Rack, M. Kleinrock, K. Kryc, C. Kokinda, E. Hayman; IODP-USIO Science Services, TAMU: J. Baldauf, T. Davies, B. Jonasson, L. Schulze, B. Lancaster; IODP-USIO Science Services, LDEO: G. Iturrino, G. Myers, M. Reagan.

The Platform Team met by conference call on the following dates:

- 27 April 2004: Discussion focused on refining a strategy for reviewing responses to the market survey and the ITT, and the role of EXMAR. It was determined that the ITT and market survey responses will be reviewed in a single integrated process. Responses will be reviewed both externally and by an internal review team.
- 17 May 2004: The team was updated on the outlook for NSF-MREFC funding. An expanded MREFC-SODV Project Team is to be identified during fall 2004 for implementation of the U.S. SODV Project. The Project Team will replace the existing Platform Team, with the transition occurring after the release of the U.S. SODV RFP in August. An initial draft of the briefing book, designed for obtaining community input about planned improvements and modifications to shipboard science capabilities and habitability, was circulated and reviewed.

The Platform Team met on 26–28 May 2004 in Washington to review EXMAR’s progress on assessing the responses to the ITT and market survey and to establish a timeline for preparation of an RFP for the U.S. SODV. The goal is to commence U.S. SODV operation before October 2006.

NSF INTERACTION AND DISCUSSION

U.S. SODV Project implementation strategy, timelines and anticipated budgets were discussed with NSF representatives at the Platform Team Meeting on 26 May 2004 in Washington, D.C. Critical elements are as follows:

- The RFP should be released in summer 2004.
- U.S. SODV operations should commence in FY06.

Given the current budget situation, it is reasonable to expect that there will be strong pressure on the MREFC portion of the NSF budget in FY05 and FY06. NSF requested USIO input to estimate what the minimal resource requirements would be in FY05 to support the continuing U.S. SODV conversion, acceptance, and commissioning efforts in FY06. The U.S. SODV project was prioritized and ranked as the top priority “new start” for FY05 by NSF in a report to Congress.

MREFC SODV budget strategy: Discussion focused on addressing NSF’s request to provide an estimate of the minimal FY05 U.S. SODV funding necessary to convert a vessel so that it could commence vessel operations in FY06. The Platform Team determined that a minimalist approach would require either a delay in vessel conversion or a series of multiple conversions to the vessel, with the conversion extended over numerous years.

In order to determine priorities for components of the overall U.S. SODV Project, the major task elements of the project were grouped into six categories and prioritized as follows:

- Priority 1—hull and machinery: This category was given the highest priority to ensure a sound vessel. Included in this category are the structural integrity, steel, piping systems, salt water cooling systems, supporting equipment electrical/pumping, transformers, thruster maintenance, water makers, and so forth.
- Priority 2—adherence to HSE standards: This category includes elements such as lifeboats, safety practices, and environmental issues such as noise, incinerators, heating, ventilating, and air-conditioning, and waste disposal. All of these components were viewed as critical to ensure safe practices and compliance with national and international regulations.
- Priority 3—drilling package: This category includes elements such as the substructure derrick base, hoisting package/drawworks traveling equipment, dual elevators, iron package, rig instrumentation, network, storage, and deck footprint for logging capabilities.
- Priority 4—science facility laboratories: The category includes structure, basic infrastructure services, air conditioning and plumbing, laboratory equipment, special equipment, regulated power, computer network, gas distribution, storage, and noise abatement.
- Priority 5—science facilities—downhole completions. This category includes legacy hole completion requirements and includes space requirements for storage of hardware, derrick capacity, and equipment handling below the rig floor.
- Priority 6—Habitability: This category includes the living quarters/galley, recreational facilities, meetings rooms, libraries, and so forth.

Initial, coarse, minimal cost estimates were completed for each element in order to obtain a rough estimate of average minimal conversion cost requirements for FY05 per NSF’s request.

PHASE 2 COMMUNITY INVOLVEMENT

As one of the major elements of involving the scientific community in the Phase 2 vessel selection and modification process, the JOI Alliance is preparing a briefing book summarizing enhancements that could be incorporated in the U.S. SODV. The intent is to circulate this document broadly throughout the national and international scientific community for comment and input. Sections of this document are to be circulated as they are completed and approved internally.

The status of the briefing book is as follows:

- Forward (draft completed and reviewed)
- Introduction (draft completed and reviewed)
- Vessel (draft in progress)
- Drilling and coring (draft in progress)
- Science requirements (draft completed and reviewed)
- Onboard science capability (draft completed and reviewed)
- Living and recreation facilities (draft completed and reviewed)

Six elements are being pursued for community involvement in the Phase 2 selection process:

- Element 1: Invite IODP-MI to coordinate an IODP Science Advisory Structure (SAS) process to provide comments on the design document(s) for the onboard science capability of the U.S. SODV.
- Element 2: Invite selected members of the science community to review and provide comments on the ITT responses submitted by contractors, in conjunction with the JOI Alliance Platform Team, in order to prepare the U.S. SODV RFP.
- Element 3: Invite selected individuals from USSAC and/or SciMP to serve as community representatives on each of the design teams tasked with planning the onboard science capability for the U.S. SODV.
- Element 4: Introduce the scientific community to the MREFC Web site and encourage the use of this site as a way to become informed about U.S. IODP Phase 2 activities. The USIO will also provide updates to stakeholders via community list servers, if and when appropriate.
- Element 5: Conduct, as appropriate, “town meetings” and/or provide updates at appropriate SAS or U.S. Science Advisory Committee (USSAC) panel meetings to ensure community awareness about the U.S. SODV planning process and to gather community input on issues. Town meetings will take place at Geological Society of America and American Geophysical Union meetings.
- Element 6: Invite the USSAC chair or delegate to serve as a nonvoting member on the U.S. SODV selection team.

APPENDIX L: IODP-USIO QUARTERLY REPORT DISTRIBUTION LIST

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