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MESSAGE FROM THE PRESIDENT AND THE BOARD CHAIRMAN

Thank you for your continued support and invaluable commitment to the IAGC in 2017. We are proud to promote and protect your essential role as the backbone of the modern energy industry!

IAGC members continue to be the indisputable leaders in the geophysical and exploration industry by advancing a culture of environmental stewardship and improving safety and operational efficiencies around the world. The world’s energy demand cannot and will not be met without us. To put it simply, energy starts here.

Around the world, the IAGC is leading the oil and gas industry’s strategy on exploration access issues and has become a credible source for engaging governments and the public with informed scientific, technical and legal analysis. Optimizing the legal and regulatory business climate for our members’ activities to succeed is our core objective and key to the industry’s continued viability.

In 2017, the IAGC and our committees have been actively and successfully engaged with governments and stakeholders critical to our license to operate in Mexico, Norway, the United Kingdom, Ireland, Australia, New Zealand, Indonesia, Brazil, Canada, Africa, India, Central Asia, the United States and Uruguay. The IAGC is expanding our global reach and forging strategic partnerships to elevate the visibility of our members and position the industry for future success.

In the past year, the IAGC achieved significant victories in the United States that have not only important implications for the future of our industry in North America, but also resounding impact for the exploration industry around the world. In a series of Executive and Secretarial Orders, the highest levels of the U.S. government specifically prioritized the authorization of new geophysical survey exploration to stimulate and support new energy development and reversed the previous denials of pending U.S. Atlantic seismic survey permit applications. The recent actions and vote of confidence in the geophysical industry from the U.S. President and his Cabinet are a clear statement that the IAGC’s efforts to ensure the exploration industry’s continued freedom to operate are succeeding.

The IAGC works behind the scenes to educate government officials and key stakeholders around the world to ensure decisions impacting the geophysical industry are based on sound science, unnecessary regulatory burdens are minimized, and roadblocks are removed.

The geophysical industry continues to navigate the longest crisis in the oil-services market, and its viability hinges not only on overcoming the many present and real regulatory challenges pushed by an anti–fossil fuel lobby around the world, but also weathering the current downturn. In response, the IAGC reduced its 2017 operating budget by 33% since 2015, and we have strived to be “Better With Less,” becoming more efficient with our resources, more strategic in our organization and more purposeful with our engagement. We also expanded our Industry Partner support, building on our collaboration with exploration and production companies to ensure continuity and sustainability in the IAGC’s mission to protect our industry’s access and freedom to operate onshore and offshore globally.

Your support is the driving force behind the Association’s 2017 successes in advancing positive changes for our industry and ensuring your freedom to operate. We expect to do even greater things on your behalf in 2018.

Nikki C. Martin
President

Maurice Nessim
2017-2018 Board Chairman
The International Association of Geophysical Contractors is the global trade association representing all segments of the geophysical and exploration industry. Our membership includes onshore and offshore survey operators and acquisition companies, data and processing providers, exploration and production companies, geophysical equipment and software manufacturers, industry suppliers, geoscience consultants, and health, safety and environmental service providers.

The IAGC works vigorously on behalf of its membership to protect the industry’s license to operate. The IAGC engages governments and stakeholders worldwide on issues central to geophysical operations and exploration access. The IAGC supports and fosters science- and risk-based regulations consistent with existing practices that are proven to be environmentally responsible, effective and operationally feasible.

IAGC MISSION

IAGC optimizes the business and regulatory climate and enhances public understanding to support a strong, viable geophysical industry essential to discovering and delivering the world’s energy resources.

IAGC VISION

IAGC’s vision is to be the most credible and effective voice for promoting and ensuring a safe, environmentally responsible and competitive geophysical industry.

IAGC STRATEGIES

Supported by an experienced and professional staff, the association promotes the long-term viability of the geophysical industry by:

- Engaging government and regulatory entities with credible scientific, technical and legal analysis to both protect the environment and develop essential energy supplies.
- Establishing strong cooperative relationships with all relevant international and national trade associations and organizations to create alignment and enhance industry unity and effectiveness in advocacy.
- Educating members on regulatory initiatives and policies affecting the geophysical industry.
- Organizing consistent industry positions on emerging policy and regulatory issues.
- Facilitating continuous improvement and promotion of health, safety, security and environment (HSSE), social responsibility, technological innovation and operations.
- Equipping members with scientific information, regulatory compliance resources and public advocacy materials.
- Recommending best practices, statements of principles and model contracts to promote environmental protection, safety and efficiency.
# 2017 Officers and Board of Directors

Maurice Nessim  
WesternGeco  
Chairman

Magne Reiersgard  
PGS  
Vice Chairman

Roger Keyte  
Past Chairman

## Board of Directors

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<tr>
<th>Name</th>
<th>Company</th>
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<tr>
<td>Maurice Nessim</td>
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<td>Magne Reiersgard</td>
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<td>Roger Keyte</td>
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<td>Past Chairman</td>
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<td>Zheng Huasheng</td>
<td>BGP International</td>
<td>Member</td>
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<td>Marianne Lefdal</td>
<td>CGG</td>
<td>EAME Chapter Chair</td>
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<td>Don Pham</td>
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<td>Charles Davison</td>
<td>FairfieldNodal</td>
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<td>James Bogardus</td>
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<td>Craig Walker</td>
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<td>Asia Pacific Chapter Chair</td>
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<td>Shawn Rice</td>
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<td>Polarcus</td>
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<td>Katja Akentieva</td>
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<td>Peter Seidel</td>
<td>TGS</td>
<td>Americas Chapter Chair</td>
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IAGC STRUCTURE

IAGC is a powerful and effective voice for the geophysical industry, made up of members with support by a dedicated, experienced and competent staff.

The IAGC manages its affairs through its three global regional Chapters. These Chapters are Americas, Asia Pacific, and Europe, Africa and Middle East (EAME). Each Chapter is chaired by a leader who comes from a Governing Member company. Chapters have associated committees that address region-specific issues.

The IAGC has five Global Committees:

- Health, Safety, Security and Environment (HSSE) Steering
- Leadership
- Legal
- Global Data Licensing
- Communications
IAGC is an international trade association with more than 100 members in nearly 50 countries.

2018 GOVERNING MEMBERS AND INDUSTRY PARTNERS

Governing Members

Industry Partners

- Anadarko
- Apache
- bhp billiton
- ConocoPhillips
- ExxonMobil
- Statoil
- Tullow Oil
- Shell
- Woodside
2018 CONTRIBUTING AND ASSOCIATE MEMBERS

Contributing Members

3D-GEO Pty Ltd.
Advanced Geophysical Technology Inc.
Alphageo (India) Ltd.
Asia Oilfield
Austin Exploration Inc.
Axxis Geo Solutions
Breckenridge Geophysical
Bridgeporth Ltd.
Dawson Geophysical Co.
DGS, Seismic Division of GEOTEC
DMT GmbH & Co. KG
DUG
EDCON-PRJ Inc.
EMGS – Electromagnetic Geoservices ASA
ES Xplore LLC
Fugro
Geofizyka Toruń S.A.
Geophysical – COSL
Geophysical Pursuit Inc.
GeoTomo LLC
Jaguar Exploration Inc.
JEBCO Seismic L.P.
JGI Inc.
Magseis ASA
MultiClient Geophysical ASA (Geoex)
Orica USA Inc.
PetroMarker AS
SAExploration
Seabed Geosolutions
Searcher Seismic Pty Ltd.
Sinopec International Petroleum Service Corp.
UnitedHealthcare Global
WGP Group

Associate Members

Africa Geophysical Services LLC
Austin Powder Co.
Benchmark Geophysical Consulting Ltd.
Bertram Drilling Inc.
Bintang Subsea
Bird Seismic Services
Clean Harbors Exploration Services Inc.
DUG (DownUnder GeoSolutions)
Ecology & Environment Inc.
Edison Chouest Offshore
Energy Quest Sdn. Bhd.
EPI Group US Inc.
Gardline Pte Ltd.
GII – The Geophysical Institute of Israel
Hind Geo Pvt Ltd.
Hind Geonodes Pvt Ltd.
Hurricane Geo Inspection Survey Sdn. Bhd.
HX Global Inc.
Low Impact Seismic Sources (LISS)
NCS SubSea Inc.
Ocean Technologies
Omni Energy Services
Poseidon Offshore (Safety & Health) Ltd. (POSH)
PT. QUEST Geophysical Asia
Remote Medical International
RemoteMD
RPS Environmental
Sapura Geosurvey Sdn. Bhd.
Schlumberger WTA (M) Sdn. Bhd.
Seiche Measurements Ltd.
Sound Oceanics LLC
SWCA Environmental Consultants
Trigstation Sdn. Bhd.
Z-Terra Inc.
2017 PRIORITIES AND ACHIEVEMENTS

The IAGC’s 2017 priorities focused on four strategic areas in establishing the Association as the leader in shaping the discussion regarding geophysical operations and elevating the issues central to our industry among the overall oil and gas industry, trade associations, governments globally, and other key stakeholders.

Protect Freedom to Operate:
Ensure access to commercial opportunities globally

- Expanded advocacy to Africa and Central Asia
- Brazil Environmental Database and Sensitivity Matrix for permitting adopted
- Marine Mammal Protection Act modernization legislation introduced and advancing
- U.S. Atlantic permit denials reversed
- Five Incidental Harassment Authorizations proposed for U.S. Atlantic
- Successfully protected the Industry’s right to defend permitted activity in court
- Forced Acoustic Guidance Review
- Mexico multi-client education a success
- Caused New Zealand Code of Conduct restart
- U.S. Gulf of Mexico (GOM) EIS published without:
  - Dolphin shutdowns
  - Buffer zones
  - Non-duplicative surveys, LPSL requirements
  - Broad closure areas
- GOM Monitoring Plan complete
- GOM Modeling complete

Raise the Visibility of the IAGC:
Improve the external perception and influence of the geophysical industry

- Seismic prioritized in U.S. Executive/Secretarial Orders
- Seismic is the Assistant Secretary, Land and Minerals’ “No. 1 priority”
- Expanded outreach and engagement with nations around the globe: Mexico, Norway, the United Kingdom, Ireland, Australia, New Zealand, Indonesia, Brazil, Canada, Africa, India, Central Asia, the United States and Uruguay
- New tagline rollout: “Energy Starts Here!”
- Increase in CEOs vested in IAGC/on the Board
- 2016 Annual Meeting – record attendance and revenue, sponsors
- Increased news coverage/recognition
- Communications Committee formed to support external affairs efforts
- Increased member communication: biweekly NewsBriefs, bimonthly InDepth newsletters, The Voice, increased member alerts, committee communication and inaugural Annual Report
- First social-media campaign with seven other trade associations to promote the vital role of energy to people’s everyday life around the world (Crude Awakenings)
Strengthen the Health of the Geophysical Industry:
Optimize the business climate, promote efficiency, safety and environmental stewardship

- Extended U.S. offshore seismic permits from two-month to one-year terms
- Formation of Global Data Licensing Committee
- Industry Partner Executive Forums
- Ghost Net Initiative
- Accounting Workgroup started and completed
- Improved HSE Forum with the greatest participation to date

Expand the Association:
Promote continuity and consistency in regulatory engagement and HSSE issues among G&G companies and E&Ps to strengthen the voice of the industry

- Added EAME support
- Added Regulatory and Governmental Affairs support
- Zooplankton Rapid Response and Strategy
- New HSSE Statistics Platform and more statistics published, including those reported earlier
- Global Fisheries Workgroup established
- New Industry Partners: Woodside, BHP Billiton, Anadarko, Tullow, Apache
- First-ever IAGC Past Chairmen’s Luncheon
GOVERNMENT ENGAGEMENT AND REGULATORY HIGHLIGHTS

The IAGC works on behalf of the geophysical industry in a constructive manner with regulators around the world as they develop and implement policy impacting the industry. We also work with the various multinational treaty organizations as they develop and disseminate recommendations. The IAGC rigorously advocates and promotes the use of credible science and risk-based regulations that are consistent with existing best practices and proven to be effective and feasible.

- 1,450 pages of letters and comments to governments of countries, organizations and multinational treaty organizations regarding policies and regulations
- Two U.S. Congressional Hearings:
  - “Examining Impacts of Federal Natural Resources Laws Gone Astray, Part II”
  - “Examining Deficiencies in Transparency at the Department of the Interior”
- Engaged with more than 120 countries in key oil and gas areas such as Mexico, Norway, the United Kingdom, Ireland, Australia, New Zealand, Indonesia, Brazil, Canada, Africa, India, Central Asia, the United States and Uruguay
- One successful Washington, D.C. “fly-In” to meet with government officials and members of Congress

Washington, D.C. “Fly-In” to Meet with Government Officials and Members of Congress
GOM Permitting Workshop

Nikki Martin Testifies Before U.S. Congress

The IAGC and Industry Partners Discuss Key Issues
PROMOTING CREDIBLE SCIENCE

Because science underpins geophysical operations, the IAGC participates in numerous scientific work groups, workshops and conferences to facilitate productive dialogue among stakeholders and promote the use of credible science as a basis for making regulatory decisions.

Conferences and Workshops

In 2017, IAGC’s Dr. Bob Gisiner has attended and presented at some of the most notable conferences in the world.

- Presented at four prestigious scientific conferences:

- Attended six major scientific conferences and workshops, 22 days:
  - Gulf of Mexico Oil Spill and Ecosystem Science Conference 2017 in New Orleans, Louisiana, February 6–9, 2017. Networking with Gulf scientists and BOEM staff on topics such as the Gulf biological data collection plan GOMAPPS.
  - State of the Gulf of Mexico Summit 2017 in Houston, Texas, March 26–28, 2017. Met with BOEM staff and IAGC/IOGP contractor LGL to advance the draft Gulf Monitoring Plan for the GOM Final EIS.
  - Gulf of Mexico Alliance and 2017 All Hands Meeting in Houston, Texas, March 29–31, 2017. Monitoring expenditure of Deepwater Horizon Recovery Funds on topics of seismic-industry interest.
  - Acoustical Society 2017 in Boston, Massachusetts, June 24–29, 2017. Furthering work on standards for towed PAM technologies, measurement of the particle motion component of sound (vital to assessments of effects of seismic on fish and invertebrates), and automated electronic measurement of marine mammal hearing to develop better data to underpin regulations.
  - Canada Cod Workshop in St. John’s, Newfoundland, November 5–7, 2017. Invited-expert panelist reviewing and advising plans for investment of industry lease funds in research of high quality and relevance to industry needs.
Member Resources

Additionally, the IAGC develops tools and resources based on sound scientific principles to aid our members in continuing to be the leaders in the continuous improvement and promotion of HSSE, social responsibility, technological innovation and operations within the geophysical industry.

Two Literature and Research Reviews:

- Results of independent reviews of McCauley (zooplankton paper)

Three Bibliographies:

- “Anthropogenic Sound and Impacts to Marine Life: An Annotated Bibliography of Selected and Frequently Cited References”
- IAGC Annotated Fish Bibliography
- Atlantic Comments Bibliography

E&P Sound and Marine Life Joint Industry Programme

The IAGC continues to support and actively participate in the Sound and Marine Life Joint Industry Programme (JIP). The JIP supports research to help increase understanding of the effect of sound on marine life generated by oil and gas exploration and production activity. The research enables governments to make informed regulatory decisions based on credible and relevant science and assists the industry in developing effective mitigation strategies. To date, the JIP has committed $60M USD to this research effort.

In 2017, the IAGC became the chair of the JIP’s Communications Committee, helping to shape the dialogue on the research findings of the JIP-funded independent research projects.

Dr. Robert Gisiner Presents Poster Session at 22nd Biennial Marine Mammalogy Conference

IAGC EAME Consultant, Ross Compton, presents at OceaNoise2017
HEALTH, SAFETY, SECURITY AND ENVIRONMENT HIGHLIGHTS

The health, safety and security of the people involved with geophysical operations, as well as the environment in which they interact, are the key reasons why the IAGC exists. Likewise, the IAGC’s vision emphasizes “the development and promotion of standards and best practices.” The ultimate aim is to achieve step-change improvement in HSSE performance in worldwide geophysical operations.

Whether on land or in the marine environment, the geophysical industry takes this responsibility seriously and promotes the sound management of environmental and cultural resources. We support measures that are proportionate to the potential risk and based on the best available science to minimize any potential impact of geophysical operations.

Our members meet on a quarterly basis to share, review and discuss the latest HSSE issues and decide how each should be addressed. The IAGC develops guidance documents that address HSSE issues impacting the geophysical industry. The IAGC also supports and contributes to the International Association of Oil and Gas Producers (IOGP) guidance documents.
Key HSSE Actions/Activities

- Created focused, solutions-oriented HSSE remit and initiatives
- Enhanced member HSSE data collection, including environmental statistics through third-party software
- Successful HSSE Fall Forum
- Support Vessel Guidelines published
- Creation and implementation of the Brazil Environmental Database
- Contribution to Allied Trade Guidance documents
  - IMCA/DMAC consultation on an update of DMAC 12 – “Safe Diving Distance from Seismic Surveying Operations”
  - API Pipeline Rules/Standards – “Guidelines for Property Development and Seismic Operations Section”
  - IOGP, “Demystifying Human Factors in Investigations”
  - IOGP 365-7, “Off-Road Variations Review”
  - IOGP 254, “Environmental Management in the Upstream Oil and Gas Industry – An Overview of Issues and Management Approaches”
  - IOGP 432, “The Rise of Commercial Unmanned Aerial Systems Within the Geophysical Sector of the Oil and Gas Industry”
  - IOGP 579, “Recommended Monitoring and Mitigation Measures for Cetaceans During Marine Seismic Survey Geophysical Operations”
  - OceaNoise2017, Barcelona, Spain, May 8–10, 2017. Introduced the issue of excessive precaution in ocean noise risk models
TOOLS, MEDIA, INITIATIVES AND OUTREACH

Media

- IAGC quotes, mentions and feature articles: 1,267
- Opinion/editorial articles published: 8
- Press releases: 14

Social Media

- Twitter Followers: 431
- Twitter Posts: 1,475
- Twitter Likes: 532

IAGC Initiatives

International Association of Geophysical Contractors (IAGC) projects and initiatives help to increase international external communication to improve the geophysical industry’s public image by educating and informing audiences about the essential role of G&G innovation in the safe discovery and delivery of energy and the industry’s international humanitarian impact.
Starting in 2017, for one week, during the first week of March, the Crude Awakenings Challenge encouraged energy users to rediscover the oil and gas industry and challenge their assumptions about oil and gas. The Challenge highlights the importance of the geophysical industry as the foundation or cornerstone of the oil and gas industry.

The 2018 Crude Awakenings Challenge, March 6–10, encourages people to chronicle on LinkedIn or Twitter their assumptions and what they discover as they use products that they did not know were made possible by oil and gas.

In partnership with the IAGC, the Crude Awakenings Challenge is sponsored by the American Oil and Gas Historical Society, American Petroleum Institute (API), Arctic Energy Center, Energy In Depth/Independent Petroleum Association of America (IPAA), Grow Louisiana Coalition, International Association of Drilling Contractors (IADC) and National Ocean Industries Association (NOIA).

The IAGC’s Ghost Net Initiative highlights the work IAGC member companies do in helping to keep the world’s oceans clean and free of lost fishing gear, or “ghost gear,” which is among the greatest killers of marine life in our oceans. The IAGC’s Ghost Net Initiative recently entered into a partnership with Healthy Seas which improves on the aim of both groups to clean the oceans and seas of derelict fishnets responsible for the unnecessary death of marine animals and recycle the removed debris. The partnership allows both organizations to expand their efforts and to coordinate on specific marine debris clean-up projects.

**“Houston Strong” Hurricane Harvey Recovery**

On August 25, Hurricane Harvey hit the coasts of Texas, Louisiana and Mississippi. Making landfall three times in six days, the hurricane ravaged Houston, leaving many of our friends, neighbors and colleagues displaced in the aftermath and depleting supplies from Houston shelters. At least 88 people lost their lives across the hurricane-stricken area.

The IAGC moved into action to give back to our community, donating $6,700 to the Houston Food Bank to help feed those who were in need. IAGC staff also volunteered with the Houston Food Bank, preparing meals for schoolchildren. During the “IAGC Day of Service,” IAGC staff members, along with board member Roger Keyte, worked with other volunteers to prepare and package more than 4,000 meals for further relief efforts.

We are proud to represent the geophysical industry from our global headquarters in the Energy Capital of the World, Houston, Texas. We are Houston Strong!

**Past Chairmen’s Luncheon**

The IAGC celebrated its legacy and history by hosting past board chairmen at a luncheon on 18 May 2017. These leaders provided great insight and perspective to staff as we work to build upon their experiences, challenges and accomplishments.

Fourteen past chairmen attended the luncheon and recounted stories of their tenures as IAGC Chairman of the Board of Directors.

**Member Outreach Resources**

- 4 new fact sheets
- 6 talking points and FAQs
PARTNER TRADES AND COALITIONS

The IAGC has expanded E&P trade association partnerships and strengthened multi-stakeholder alliances through increased interaction and cooperation to foster alignment and support of IAGC initiatives and positions.
The IAGC 2017 mantra was “Better With Less.” We have been diligently working to reflect the state of our industry by becoming more efficient and more strategic with our resources and efforts.

### 2017 Revenue by Membership Category

- **Associate**: $130,000 (5%)
- **Contributing**: $63,700 (3%)
- **Governing**: $364,341 (14%)
- **Industry Partner**: $1,990,243 (78%)

**TOTAL: $2,548,284**

The IAGC 2017 budget decreased by 33% from 2015.

- 2017 budget: $2,440,288
- 2015 budget: $3,589,088
WHAT OUR MEMBERS ARE SAYING

There has never before been a time when the industry was more in need of a strong, credible, unified voice to represent it in the face of public and regulatory pressure, and it is clear to me that the Association has risen to meet this challenge in a very impressive manner. The IAGC staff are knowledgeable, experienced professionals who have recently achieved significant successes in shaping regulatory frameworks around the world to preserve our freedom to operate responsibly, as well as building strong partnerships with other related trade associations and our oil company clients, through the Industry Partner membership. ... My personal involvement in the Association has always been stimulating and rewarding, but contributing to meet the challenges facing the industry today with such an expert and effective IAGC staff provides even greater satisfaction, and a sense of achievement that I value greatly.

Shifting political views, ever-increasing regulatory requirements, negative public opinion, fake news, and eNGO activities have added significant and costly mitigation requirements to our operations and have threatened the industry’s ability to reasonably obtain the necessary permits to carry out seismic surveys. “The work of the IAGC has been effective and productive in stemming this tide by raising awareness with public outreach programs, science-based information and education materials, and direct engagement with the regulators, lawmakers, public, media and eNGOs. The IAGC has been recognized by other major E&P trade associations for its focused and effective efforts on operational and environmental regulatory process and reform, and as a result it has been able to harness the strength and support of the broader E&P community with its advocacy efforts.

The IAGC provides an invaluable opportunity for us to collaborate with other member companies and industry partners on the issues that are affecting all of us, to pool our efforts to effect real and necessary change, and to position us all for future success.
IAGC STAFF

Nikki Martin
President

Gail Adams-Jackson
VP of Communications & External Affairs

Dr. Robert Gisiner
VP of Marine Environment & Biology

Dustin Van Liew
VP of Regulatory & Governmental Affairs

Criss Rennie White
Director of Membership & Administration

Jameson White
Manager - Regulatory & Governmental Affairs

Krystal Coker
External Affairs Assistant

Sonja Santana
Sr. Executive Assistant