

# ATTACHMENT A

## SCOPE OF WORK

### OVERALL PROJECT OBJECTIVES:

The completed Monterey County Regional Conservation Investment Strategy planning document will provide the following:

1. Inventory the available data sources for species and habitat, and describe the existing wildlife connectivity and linkages;
2. Develop a climate change vulnerability assessment of species and habitat to climate change related stressors and pressures (drought, wildfire, and landslides, among others);
3. Develop conservation strategies to improve resiliency from the identified stressors, including identifying the benefits to transportation infrastructure;
4. Identify mitigation needs of regional transportation improvements; and
5. Prepare for implementation by identifying areas for compensatory mitigation for impacts to species and natural resources, and incorporate the results of the study into the plans and designs of transportation infrastructure projects to improve climate resiliency.

### TASKS & DELIVERABLES

#### 1. Project Design, Management, Stakeholder Coordination & Meetings

##### Task 1.1 – TAMC, Consultant, & Caltrans Coordination

- Monthly to bi-monthly project team meetings with consultant and stakeholders, including Caltrans District 5, to ensure effective communication and that the project remains on time and within budget.
- Responsible Party: TAMC / Consultant

<u>Task</u>	<u>Deliverable</u>
<i>1.1</i>	<i>Monthly meeting notes</i>

#### 2. Public Outreach

##### Task 2.1 – Stakeholder Analysis

- Determine interested and effect parties, including governmental agencies, community groups, business groups, and organizations conducting conservation activities in Monterey County.
- Responsible Party: TAMC / Consultant

### Task 2.2 – Online Outreach

- Create a project website with project information, announcements, and comment box for the public to submit feedback. The website will be a resource for communicating project information and receiving public comments.
- Target outreach to solicit public input from citizens unable to attend community workshops or presentations with an interactive online project forum.
- Responsible Party: TAMC / Consultant

### Task 2.3 – Stakeholder Meetings

- Meet and work with local boards and councils, community groups, and business groups. Solicit feedback from stakeholders.
- Responsible Party: TAMC / Consultant

### Task 2.4 – Presentation #1 to Board of Directors

- Presentation to introduce the Regional Conservation Investment Strategy plan to the TAMC decision-making body, define the scope of the plan, introduce the project website, and solicit feedback from the Board and public about the plan.
- Responsible Parties: TAMC / Consultant

### Task 2.5 – Community Workshop

- This workshop will present substantial draft findings of the plan to the community and solicit feedback from the public about the plan findings. Public comments will be used to help finalize the conclusions and recommendations.
- Responsible Parties: TAMC / Consultant

### Task 2.6 – Presentation #2 to Board of Directors

- Present a substantial draft finding of the plan to the community and solicit final feedback from the TAMC Board and public about the plan findings.
- Responsible Party: TAMC / Consultant

<b><u>Task</u></b>	<b><u>Deliverable</u></b>
2.1	<i>Stakeholder matrix</i>
2.2	<i>Agency website, social media pages, and interactive online project forum</i>

2.3	<i>Presentation materials, meeting notes, and stakeholder feedback</i>
2.4	<i>Presentation materials, meeting notes, and public / Board feedback</i>
2.5	<i>Workshop, post-workshop summary, and public feedback</i>
2.6	<i>Presentation materials, meeting notes, and public / Board feedback</i>

### 3. Background & Introduction

#### Task 3.1 – Consultant Kick-off Meeting

- The Transportation Agency for Monterey County will hold a consultant team kickoff meeting, with Caltrans District staff, to discuss the project scope of work, approach, consultant and agency expectations, and timeline.
- Responsible Party: TAMC / Consultant

#### Task 3.2 – Draft RCIS Outline

- The consultant, in consultation with TAMC and Caltrans District staff, will develop an outline for the Regional Conservation Investment Strategy plan, incorporating the feedback of the stakeholder group, the requirements of the Fish and Game Code, CDFW's Regional Conservation Investment Strategies Program Guidelines, and examples of other Regional Conservation Investment Strategy plans as guidance. An Overview and Background section will be developed and include a summary of the process, including the enabling legislation and purpose of the RCIS. It will also describe the conservation purpose and need for the RCIS, describe and explain a rationale for its boundary and describe stressors and pressures in the region.
- Responsible Party: Consultant

#### Task 3.3 – Applicable State and Local Requirements

- The State legislation for Regional Conservation Investment Strategy plans requires that a RCIS include provisions that the strategy will follow all applicable State and local requirements and will not preempt the authority of local agencies to implement infrastructure and urban development in local general plans. This section will briefly describe applicable State and local requirements and how the RCIS is consistent with or does not conflict with them.
- Responsible Party: Consultant

<b>Task</b>	<b>Deliverable</b>
3.1	<i>Meeting summary</i>

3.2	<i>RCIS document outline, stakeholder feedback</i>
3.3	<i>Review of State and local requirements, and RCIS consistency chapter</i>

#### **4. Develop RCIS Existing Conditions Report**

##### **Task 4.1 – Gather & Describe Data Sources**

- The consultant will gather and document existing data. This effort will be coordinated with the stakeholder group to identify any other relevant data sources, specifically targeting geospatial data to incorporate into a comprehensive Geographic Information System (GIS) platform. Efforts will be focused on: land use, agriculture crops, habitat ranges of focal flora and fauna of sensitive species, infrastructure, hydrography, habitat connectivity, State of California and Federal protected areas, open space/conservation areas, sensitive resources, sea level rise and climate change data.
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- Responsible Party: Consultant

##### **Task 4.2 – Gather & Incorporate Land Use Data**

- The consultant will compile land use information for the Monterey County region. A snapshot of agricultural land use, including types and acres of crops grown and acres under Williamson Act protection or in non-renewal status, in addition to other land uses will also be compiled. This information will be used to develop a conservation strategy that considers important land uses, including working lands, in the strategy area.
- The RCIS land use section requires consideration of major water, transportation and transmission infrastructure facilities, urban development areas, and city, county, and city and county general plan to address the requirement of AB 2087. The RCIS must consider the conservation benefits of preserving working lands for agricultural uses and open space. To serve as a basis for this assessment, the RCIS will describe the working lands in the Monterey County area.
- Responsible Party: Consultant

##### **Task 4.3 – Regional Planning Environment**

- The consultant will prepare a description of existing or developing plans and programs that address the strategy area. A thorough understanding of the regional planning environment for the strategy area will be a critical component of the RCIS, to provide a context for the RCIS and to ensure that the RCIS incorporates and complements existing conservation strategies and development plans. This review will also allow for the identification of potential conflicts between planning efforts that need to be resolved

through the RCIS or other means. Plans and programs will fall under the following categories.

1. **Conservation Plans and Strategies.** As required under the legislation, the RCIS will stipulate that the strategy will be consistent with and complement overlapping other habitat conservation efforts or state and federal recovery plans.
  2. **Development Plans.** This section will include descriptions of city and county general plans and any relevant transportation plans, flood improvement plans, capital improvement programs, renewable energy plans, and other key infrastructure or development projects. The purpose of this description is to identify potential users of the RCIS, potential impacts to RCIS focal species and to identify and avoid potential conflicts between the conservation strategy and development plans. The RCIS will include consideration of (as required by the legislation):
    - Reasonably foreseeable development of infrastructure facilities.
    - Reasonably foreseeable projects in the strategy area, including, but not limited to, housing.
    - Reasonably foreseeable development to produce renewable energy
- Responsible Party: Consultant

#### **Task 4.4 – Assessment of Conservation Elements, Land Cover & Habitats**

- The consultant will identify the most significant resource conservation elements, land cover and habitats (e.g., natural communities, habitat and protected areas) in the region to be included in the RCIS; assemble data; and map the conservation elements.
- Responsible Party: Consultant

#### **Task 4.5 – Describe Habitat Connectivity & Linkages**

- The California Department of Transportation and CDFW commissioned the California Essential Habitat Connectivity Project, which includes a Statewide Essential Habitat Connectivity Map. The RCIS will incorporate this information into the planning document. Other relevant plans will be identified and incorporated, as necessary.
- Responsible Party: Consultant

#### **Task 4.6 – Draft Existing Conditions Report**

- The consultant will prepare a draft Existing Conditions report, including all tables and figures, for TAMC and stakeholder group to review.
- Responsible Party: TAMC / Consultant

<b>Task</b>	<b>Deliverable</b>
4.1	<i>Documentation of existing data sources</i>
4.2	<i>Documentation of land use data</i>
4.3	<i>Report of the existing and developing plans / program that impact the strategy area</i>
4.4	<i>Matrix of data and map of the conservation elements</i>
4.5	<i>Documentation of State and local habitat studies that impact the strategy area</i>
4.6	<i>Draft Existing Conditions report, and stakeholder feedback</i>

## **5. Develop Conservation Strategy**

### **Task 5.1 – Identify Focal Species**

- Identify the proposed focal species and valuable resource conservation elements (e.g., natural communities, habitat and protected areas) to be included in the RCIS. Assemble focal species data and map the focal species and conservation elements. This task will include a discussion of the strategy and approach to identification of focal species with input from TAMC and Caltrans District staff, and feedback from the stakeholder group.
- Responsible Party: Consultant

### **Task 5.2 – Conduct Conservation Gap Analysis**

- The consultant will conduct a gap analysis for natural communities and focal species in the strategy area. A summary of all approved protected areas and mitigation banks or conservation banks in the strategy area will be developed and mapped.
- Responsible Party: Consultant

### **Task 5.3 – Develop Climate Change Vulnerability Assessment**

- The consultant will conduct a climate change vulnerability assessment for the identified focal species. The RCIS will include a vulnerability index for each focal species to help determine which focal species are most at risks based on the species' ability to respond to changes in climate. AB 2087 requires a summary of historic, current, and projected future stressors and pressures in the strategy area, including climate change vulnerability, on the focal species, habitat and other natural resources. Stressors in the strategy area include landscape fire, invasive species, land use conversion, and urbanization, which are important stressors currently affecting focal species and anticipated to continue in the future. Major threats and stressors will be incorporated into the conservation analyses.

- Responsible Party: Consultant

#### **Task 5.4 – Develop Conservation Goals & Objectives**

- The consultant, with coordination from TAMC, Caltrans District staff, and the stakeholder group, will identify conservation goals and measurable objectives for the focal species and important conservation elements identified in the RCIS that address or respond to the identified stressors and pressures on focal species and other conservation elements.
- Responsible Party: TAMC / Consultant

#### **Task 5.5 – Identify Conservation Priorities & Conservation Actions**

- The consultant will compile conservation priorities to address the focal species and other priorities identified during the planning process.
- The consultant will identify conservation actions and habitat enhancement actions that could achieve the conservation goals and objectives. Examples of conservation actions include protection through easement or fee acquisition and habitat restoration, and examples of habitat enhancement actions include wildlife corridor projects or conservation activities on currently protected lands, as described in AB 2087. The RCIS will also consider and describe the conservation benefits of preserving working lands for agricultural uses, as required by the Fish and Game Code. The benefits of each conservation action to transportation infrastructure will also be assessed and documented. In addition, potential green infrastructure solutions that provide a cost-effective, resilient approach to managing wet weather impacts and provide community benefits will also be assessed and documented for their co-benefits.
- The consultant will closely coordinate with staff from TAMC and Caltrans District, and the stakeholder group, to develop the conservation priorities in a manner that prevents or alleviates conflicts with other plans. One workshop with stakeholders will be held to incorporate local expertise and receive feedback.
- Responsible Party: TAMC / Consultant

#### **Task 5.6 – Develop Monitoring & Adaptive Management Framework**

- Section 1856(b) of the Fish and Game Code requires that Regional Conservation Investment Strategy plans include the following:
  1. An adaptive management and monitoring strategy for conserved habitat and other conserved natural resources.
  2. A process for updating the scientific information used in the strategy, and for evaluating the effectiveness of conservation actions and habitat enhancements

identified in the strategy offsetting identified threats to focal species and to achieve the strategy's biological goals and objectives, at least once every ten years.

3. Identification of a public or private entity that will be responsible for the periodic evaluation and for updating the strategy periodically to incorporate the best available scientific information and analyses.
  4. A description of how the strategy's conservation goals and objectives provide for adaptation opportunities against the effects of climate change for species covered by the strategy.
- During this process of developing the Regional Conservation Investment Strategy plan, TAMC, Caltrans, and the stakeholder group will identify an entity that will be responsible for periodic evaluation and updating of the RCIS. The revised and expanded monitoring and adaptive management strategy will be developed as a framework strategy focused on the entire RCIS, not particular focal species. Mitigation Credit Agreements are required to have a specific adaptive management and monitoring strategy directed at focal species (the species for which mitigation credits are requested) and suites of mitigation sites. The adaptive management and monitoring framework in the RCIS will provide a framework to support the Mitigation Credit Agreements that may be developed in the strategy area.
  - Responsible Party: Consultant

#### **Task 5.7 – Prepare Assessment of Consistency with Other Plans**

- Under the Fish and Game Code, Regional Conservation Investment Strategy plans are required to provide an explanation of how the strategy is consistent with or complements any draft or final natural community conservation plan, habitat conservation plan, recovery plan, and other conservation or recovery plan that overlaps with the RCIS area. The RCIS will describe how it is consistent with and complements other pertinent plans identified during the RCIS preparation. This section will describe potential conflicts identified with plans that are existing or in preparation.
- Responsible Party: Consultant

#### **Task 5.8 – Develop Draft RCIS Conservation Strategy**

- The draft Regional Conservation Investment Strategy report will be developed including maps, all tables and figures, for TAMC and stakeholder group review.
- Responsible Party: TAMC / Consultant



<b>Task</b>	<b>Deliverable</b>
5.1	<i>Matrix of focal species and resource conservation elements</i>
5.2	<i>Map of all approved mitigation banks / conservation banks in the strategy area</i>
5.3	<i>Climate change vulnerability assessment for the identified focal species</i>
5.4	<i>Report of goals and measurable objectives, and stakeholder feedback</i>
5.5	<i>Matrix of conservation priorities and actions, and stakeholder feedback</i>
5.6	<i>Documentation of climate change adaptation opportunities</i>
5.7	<i>Consistency analysis of proposed conservation strategy with existing plans</i>
5.8	<i>Draft RCIS Conservation Strategy report, and stakeholder feedback</i>

## **6. Develop RCIS Implementation**

### **Task 6.1 – Describe Project-Level Use of the RCIS**

- The RCIS will include a description of how it can be used for project-level planning and permitting. This is expected to facilitate project permitting, in that regulatory agencies are more likely to accept projects that include a mitigation strategy that is consistent with the RCIS.
- Responsible Party: Consultant

### **Task 6.2 – Identify Mitigation Needs of Regional Transportation Improvements**

- Develop an inventory of species and habitat that will potentially be displaced from the construction of regional transportation improvements, and identify potential conservation actions that could serve as mitigation for these impacts, including maps of the proposed improvements and impacted areas requiring mitigation. At a minimum, the following transportation improvements will be considered:
  - Highway 68 Safety & Traffic Flow – Monterey to Salinas
  - State Route 156 Safety Improvements
  - US-101 Safety Improvements – South County
  - Marina-Salinas Multimodal Corridor
  - Highway 1 Traffic Relief – Busway
  - Holman Highway 68 Safety & Traffic Flow
  - Fort Ord Regional Trail and Greenway
  - G12 Corridor

- Responsible Party: Consultant

### **Task 6.3 – Describe Advance Mitigation Planning**

- This section of the RCIS will describe the relationship between the RCIS and advance mitigation planning. The RCIS will provide a basis for the development of Mitigation Credit Agreements. Separate Mitigation Credit Agreements (not included in this scope of work) or templates such as a conservation easement template could be developed to append to the RCIS to facilitate advance mitigation.
- Responsible Party: Consultant

### **Task 6.4 – Update Implementation Structure**

- An appropriate framework for implementing the RCIS will be developed in conjunction with the stakeholder group. As part of the framework, the RCIS will identify the relevant state and federal regulatory policies (such as the Endangered Species Act, California Endangered Species, Act, the Clean Water Act, CEQA, NEPA, etc.) and a brief description as to how regulatory agencies and project proponents can use the RCIS to align with regulatory requirements.
- Responsible Party: Consultant

### **Task 6.5 – Complete RCIS Implementation Strategy**

- The draft RCIS Implementation Strategy chapter will be prepared including all tables and figures.
- Responsible Party: TAMC / Consultant

<b>Task</b>	<b>Deliverable</b>
6.1	<i>Report describing how the RCIS can be used for project planning and permitting</i>
6.2	<i>Inventory and maps of transportation impacts and mitigations</i>
6.3	<i>Report describing the relationship between the RCIS and advance mitigation planning</i>
6.4	<i>Report describing how the RCIS aligns with regulatory requirements</i>
6.5	<i>Draft RCIS Implementation Strategy report, and stakeholder feedback</i>

## 7. Prepare Draft & Final RCIS

### **Task 7.1 – Admin Draft RCIS**

- Compile outcomes of public workshops, presentations, and online outreach efforts, graphics, and draft plan chapters. Conclude findings on recommendations for the Regional Conservation Investment Strategy.
- Responsible Party: TAMC / Consultant

### **Task 7.2 – Draft RCIS**

- Revised Administrative Draft Plan incorporating comments from TAMC and Caltrans District staff.
- Responsible Party: TAMC / Consultant

### **Task 7.3 – Final RCIS**

- Completed document of planning findings and conclusions.
- Responsible Party: TAMC / Consultant

### **Task 7.4 – Board of Directors Approval**

- Present final Regional Conservation Investment Strategy plan to the TAMC Board of Directors for adoption.
- Responsible Party: TAMC / Consultant

### **Task 7.5 – Develop Interactive Website**

- The consultant will compile priority data in a consistent format that can be uploaded for interactive use in an Internet Web portal and that would allow stakeholders to generate queries of regional conservation values within the strategy area. To meet this legislative requirement, an interactive web portal will be explored and recommended options based on functionality, ease of use and cost will be identified. This will help ensure stakeholders have an opportunity to explore the data and conservation priorities in the RCIS.
- Responsible Party: Consultant

<b><u>Task</u></b>	<b><u>Deliverable</u></b>
7.1	<i>Administrative draft document</i>

7.2	<i>Draft document</i>
7.3	<i>Final document</i>
7.4	<i>Presentation materials</i>
7.5	<i>Interactive public website</i>