

# Board of Directors San Simeon Community Services District



## REGULAR BOARD MEETING PACKET

June 14, 2022

Meeting Start Time 5:00 pm

Virtual Board Meeting via Zoom Webinar

Prepared by:



**GRACE**  
ENVIRONMENTAL SERVICES

**AGENDA**  
**SAN SIMEON COMMUNITY SERVICES DISTRICT**  
**BOARD OF DIRECTORS REGULAR BOARD MEETING**  
**Tuesday, June 14, 2022**  
**5:00 pm**

Pursuant to San Simeon CSD Resolution 22-448 and in compliance with AB 361 this meeting shall occur as a virtual teleconference using the Zoom app.

**Internet Meeting Location – Via ZOOM**

**Join Zoom for Regular Board Session:**

<https://us02web.zoom.us/j/87307810050>

**Or One tap mobile:**

**US: +16699009128, 87307810050#**

**Or Telephone:**

**Dial (for higher quality, dial a number based on your current location):**

**US: +1 669 900 9128**

The following commands can be entered via DTMF tones using your **phone's** dial pad while in a **Zoom meeting**: \*6 - Toggle mute/unmute. \*9 - **Raise hand**.

**Webinar ID: 873 0781 0050**

**NOTE:** On the day of the meeting, the virtual meeting room will be open 30 minutes prior to the meeting start time. If you wish to submit public comment in the written format you can email Cortney Murguia at [admin@sansimeoncsd.org](mailto:admin@sansimeoncsd.org). Members of the public can also contact the District office at (805) 927-4778 or (805) 400-7399 with any questions or concerns related to this agenda or accessing the meeting.

**1. REGULAR SESSION:**

A. Roll Call

**2. PUBLIC COMMENT FOR ITEMS NOT ON THE AGENDA:**

**Public Comment** - Any member of the public may address the Board relating to any matter within the Board's jurisdiction, provided the matter is not on the Board's agenda.

Presentations are limited to three (3) minutes or less with additional time at the discretion of the Chair. Your comments should be directed to the Board as a whole and not directed to individual Board members. The Brown Act restricts the Board from taking formal action on matters not published on the agenda.

**3. SPECIAL PRESENTATIONS AND REPORTS:**

**A. STAFF REPORTS:**

- i. **Sheriff's Report** – Report for May.
- ii. **CHP Report** – Report for May.

- iii. **Superintendent's Report** – Summary of May Activities.
- iv. **General Manager's Report** – Summary of May Activities.
- v. **District Financial Summary** – Summary of May Financials.
- vi. **District Counsel's Report** – Summary of May Activities.
- vii. **Board Member Report** – Summary of May Activities.

**B. AD-HOC & STANDING COMMITTEE REPORTS:**

- i. **Status Update** – No Camping Ordinance in the District Boundary.
- ii. **Status Update** – Coastal Hazard Response Plan (CHRP).
- iii. **Status Update** – Budget Committee.
- iv. **Status Update** – Water Committee.

**Public Comment** – This public comment period provides an opportunity for members of the public to address the Board on matters discussed during Agenda Item #3 Special Presentations and Reports. If a member of the public wishes to speak at this time, Public Comment is limited to three (3) minutes.

**4. CONSENT AGENDA ITEMS:**

**Public Comment** – This public comment period provides an opportunity for members of the public to address the Board on matters discussed during Agenda Item #4 Consent Agenda Items. If a member of the public wishes to speak at this time, Public Comment is limited to three (3) minutes.

- A. ADOPTION OF RESOLUTION 22-449 TO CONTINUE VIRTUAL MEETINGS PURSUANT TO THE PROVISIONS OF AB 361.**
- B. REVIEW AND APPROVAL OF MINUTES FOR THE REGULAR MEETING ON MAY 10, 2022.**
- C. REVIEW AND APPROVAL OF MINUTES FOR THE SPECIAL MEETING ON MAY 26, 2022.**
- D. REVIEW AND APPROVAL OF DISBURSEMENTS JOURNAL.**
- E. ADOPTION OF RESOLUTION 22-450 APPROVING THE PROPOSITION 4 APPROPRIATION LIMIT FOR THE FISCAL YEAR 2022-2023.**
- F. APPROVAL OF A TRANSFER OF FUNDS FROM THE MONEY MARKET ACCOUNT TO THE LOCAL AGENCY INVESTMENT FUND (LAIF) ACCOUNT IN THE AMOUNT OF \$900,000.00.**
- G. APPROVAL OF JEFF OLIVEIRA TO BE A VOTING MEMBER OF THE WATER RESOURCES ADVISORY COMMITTEE (WRAC) ON BEHALF OF THE SAN SIMEON CSD.**
- H. APPROVAL FOR STAFF TO WORK WITH THE LOCAL AREA FORMATION COMMISSION (LAFCO) ON MATTERS RELATED TO THE HORSE TROUGH CONSUMPTION.**
- I. APPROVAL FOR STAFF TO DRAFT A WATER WILL SERVE LETTER AND BEGIN REVISIONS TO DISTRICT ORDINANCE NO. 102.**

**5. PUBLIC HEARING:**

**Public Comment** – This public comment period provides an opportunity for members of the public to address the Board on matters discussed during Agenda Item #5 – Public Hearing items. If a member of the public wishes to speak at this time, Public Comment is limited to three (3) Minutes.

**A. CONSIDERATION OF ADOPTION OF RESOLUTION 22-451 APPROVING THE FISCAL YEAR BUDGET FOR 2022/2023.**

**6. BUSINESS ACTION ITEMS:**

**Public Comment** – Public comment will be allowed for each individual business item. Members of the public wishing to speak on business items may do so when recognized by the Presiding Officer. If a member of the public wishes to speak at this time, Public Comment is limited to three (3) minutes per person for each business item.

**A. BOARD DISCUSSION, CONSIDERATION, AND APPROVAL OF PROPOSALS RELATED TO GRANT WRITING SERVICES FOR THE PERIOD OF THREE YEARS.**

**B. BOARD DISCUSSION, CONSIDERATION, AND APPROVAL OF PROPOSALS RELATED TO ENVIRONMENTAL PLANNING SERVICES FOR THE PERIOD OF THREE YEARS.**

**C. DISCUSSION, CONSIDERATION, DIRECTION TO STAFF REGARDING THE DISTRICTS EXISTING LIABILITY INSURANCE POLICY WITH SPECIAL DISTRICT RISK MANAGEMENT AUTHORITY (SDRMA) RENEWAL.**

**D. DISCUSSION, CONSIDERATION, AND APPROVAL OF THE RECOVERED ORGANIC WASTE PRODUCT PROCUREMENT POLICY.**

**E. DIRECTION REGARDING A REQUEST FOR PROPOSAL RELATED TO SERVICES FOR OPERATIONS, MAINTENANCE AND GENERAL MANAGER SERVICES.**

**7. CLOSED SESSION:**

This public comment period provides an opportunity for members of the public to address the Board on Closed Session Agenda Items. Public Comment is limited to three (3) minutes.

The Board will adjourn to Closed Session to address the following items:

**A. CONFERENCE WITH LEGAL COUNSEL - ANTICIPATED LITIGATION**

Exposure to litigation pursuant to paragraph (2) of subdivision (d) of Government Code Section §54956.9 – Ron Hurlbert

**MEMBERS OF THE PUBLIC: Please Join Us for the Remainder of the Meeting –**

**Part Two is Here:**

**Meeting ID: 893 3496 1643**

**Passcode: 972125**

**\*\*\*\*RECONVENE TO OPEN SESSION\*\*\*\***

### **Report on Closed Session**

**8. BOARD/STAFF GENERAL DISCUSSIONS AND PROPOSED AGENDA ITEMS** – Requests from Board members to Staff to receive feedback, prepare information, and/or place an item on a future agenda(s).

**9. ADJOURNMENT** –

All staff reports or other written documentation, including any supplemental material distributed to a majority of the Board within 72 hours of a regular meeting, relating to each item of business on the agenda are available for public inspection during regular business hours in the District office, 111 Pico Avenue, San Simeon. If requested, this agenda shall be made available in appropriate alternative formats to persons with a disability, as required by the Americans with Disabilities Act. To make a request for a disability-related modification or accommodation, contact the District Administrator at 805-927-4778 as soon as possible and at least 48 hours prior to the meeting date. This agenda was prepared and posted pursuant to Government Code Section 54954.2.

### **3.A.iii. Special Presentations and Reports: Superintendent Reports**



## SUPERINTENDENT'S REPORT

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### Item 3.A.ii

#### 1. Wastewater Treatment Plant

- Sampling, testing, and reporting at the Wastewater Treatment Plant was performed as required by the Regional Water Quality Control Board (RWQCB).
- The monthly report was submitted to the State Water Resources Control Board (SWRCB).
- Baffles were replaced in the Clarifiers.
- Chlorine Contact Chamber baffles and gates were replaced.
- Hearst Castle reopened on 5/11/22 and state flows increased.

#### 2. Water Treatment and Distribution System

- Sampling, testing, and reporting was performed as required by the State Water Resources Control Board (SWRCB), Division of Drinking Water (DDW).
- The monthly report was submitted to the SWRCB, DDW.
- Filter Operations were terminated for the rain season on 5/10/22.
- Maintenance was performed on both wells' discharge Cla Vals.
- Monthly water meter reading was performed.

#### 3. District and Equipment Maintenance

- Staff continues with the scheduled preventive maintenance for the equipment at the facilities.
- Street Sweeping was performed on 5/16/22
- New Parking Ordinance Signs were installed by Toste.
- A Loose and Broken Toekick was replaced on the Pico Beach Access Stairs

San Simeon Community Services District

Superintendent's Report

May 2022

MONTHLY DATA REPORT

Date	Day	Wastewater Influent Daily Flow	Wastewater Effluent Daily Flow	Well 1 Total Daily Produced	Well 2 Total Daily Produced	Total Daily Water Produced	R.O. Daily Influent Flow	R.O. Daily Effluent Flow	R.O. Daily Brine Flow	Distribution Chloride	Chloride Wells 1 2	Recycled Water Distributed	Water Level Well 1	Water Level Well 2	Rainfall in Inches	State Flows	
05/01/22	Sunday	59,416	66,950	85,347	0	85,347	0	0	0	-	-	-	0	9.6	9.5	0.00	1,804
05/02/22	Monday	56,419	59,600	56,100	0	56,100	0	0	0	-	-	-	0	9.6	9.4	0.00	3,887
05/03/22	Tuesday	53,088	57,900	57,072	0	57,072	0	0	0	-	-	-	0	9.6	9.4	0.00	1,754
05/04/22	Wednesday	33,800	50,490	15,110	68,741	83,851	0	0	0	32	<30	<30	0	9.6	9.4	0.00	1,280
05/05/22	Thursday	32,414	43,680	66,198	0	66,198	0	0	0	-	-	-	0	9.6	9.3	0.00	2,340
05/06/22	Friday	39,645	44,980	52,510	0	52,510	0	0	0	-	-	-	0	9.6	9.3	0.00	1,998
05/07/22	Saturday	67,263	78,640	74,052	0	74,052	0	0	0	-	-	-	0	9.6	9.3	0.00	1,950
05/08/22	Sunday	56,778	57,970	54,305	0	54,305	0	0	0	-	-	-	0	9.6	9.4	0.00	2,152
05/09/22	Monday	58,654	61,280	0	58,718	58,718	0	0	0	-	-	-	0	9.6	9.4	0.00	2,520
05/10/22	Tuesday	51,438	43,280	60,438	0	60,438	0	0	0	-	-	-	0	9.6	9.4	0.00	1,143
05/11/22	Wednesday	41,567	67,380	97,165	0	97,165	0	0	0	32	<30	<30	0	9.6	9.2	0.00	1,646
05/12/22	Thursday	62,349	52,390	19,598	0	19,598	0	0	0	-	-	-	0	9.6	9.3	0.00	5,076
05/13/22	Friday	51,132	57,160	72,556	0	72,556	0	0	0	-	-	-	0	9.7	9.4	0.00	5,300
05/14/22	Saturday	69,948	76,930	75,249	0	75,249	0	0	0	-	-	-	0	9.7	9.6	0.00	7,629
05/15/22	Sunday	76,747	97,280	86,244	0	86,244	0	0	0	-	-	-	0	9.7	9.6	0.00	10,494
05/16/22	Monday	55,386	58,770	70,536	0	70,536	0	0	0	-	-	-	0	9.6	9.4	0.00	30,482
05/17/22	Tuesday	57,190	59,640	65,525	0	65,525	0	0	0	-	-	-	0	9.3	9.1	0.00	7,151
05/18/22	Wednesday	59,960	60,490	66,647	55,128	121,774	0	0	0	35	-	-	0	9.2	9.0	0.00	5,012
05/19/22	Thursday	48,955	62,700	0	0	0	0	0	0	-	-	-	0	9.1	9.0	0.00	5,851
05/20/22	Friday	60,648	64,570	114,145	0	114,145	0	0	0	-	-	-	0	9.2	9.0	0.00	6,187
05/21/22	Saturday	66,425	80,530	42,561	13,838	56,399	0	0	0	-	-	-	0	9.3	9.0	0.00	6,790
05/22/22	Sunday	63,888	69,860	0	70,312	70,312	0	0	0	-	-	-	0	9.3	9.1	0.00	8,535
05/23/22	Monday	58,666	62,240	74,127	0	74,127	0	0	0	-	-	-	0	9.5	9.2	0.00	7,248
05/24/22	Tuesday	59,459	64,890	75,324	0	75,324	0	0	0	-	-	-	0	9.6	9.4	0.00	5,003
05/25/22	Wednesday	49,899	57,460	76,146	0	76,146	0	0	0	<30	-	-	0	9.6	9.4	0.00	4,916
05/26/22	Thursday	54,126	60,890	78,091	0	78,091	0	0	0	-	-	-	0	9.7	9.5	0.00	6,776
05/27/22	Friday	58,649	61,970	87,516	0	87,516	0	0	0	-	-	-	0	9.7	9.5	0.00	3,879
05/28/22	Saturday	76,287	80,640	37,624	0	37,624	0	0	0	-	-	-	0	9.7	9.4	0.00	4,122
05/29/22	Sunday	85,040	86,360	0	89,835	89,835	0	0	0	-	-	-	0	9.7	9.4	0.00	13,953
05/30/22	Monday	64,142	74,790	105,992	0	105,992	0	0	0	-	-	-	0	9.7	9.4	0.00	13,774
05/31/22	Tuesday	68,950	75,190	52,510	0	52,510	0	0	0	-	-	-	0	9.7	9.4	0.00	9,161
<b>TOTALS</b>		<b>1,798,328</b>	<b>1,996,900</b>	<b>1,818,687</b>	<b>356,572</b>	<b>2,175,259</b>	<b>0</b>	<b>0</b>	<b>0</b>				<b>0</b>			<b>0.00</b>	<b>189,813</b>
Average		58,011	64,416	58,667	11,502	70,170	0	0	0	33	<30	<30	0	9.6	9.3	0.00	6,123
Minimum		32,414	43,280	0	0	0	0	0	0	32	0	<30	0	9.1	9.0	0.00	1,143
Maximum		85,040	97,280	114,145	89,835	121,774	0	0	0	35	0	<30	0	9.7	9.6	0.00	30,482



**DATA SUMMARY SHEET**

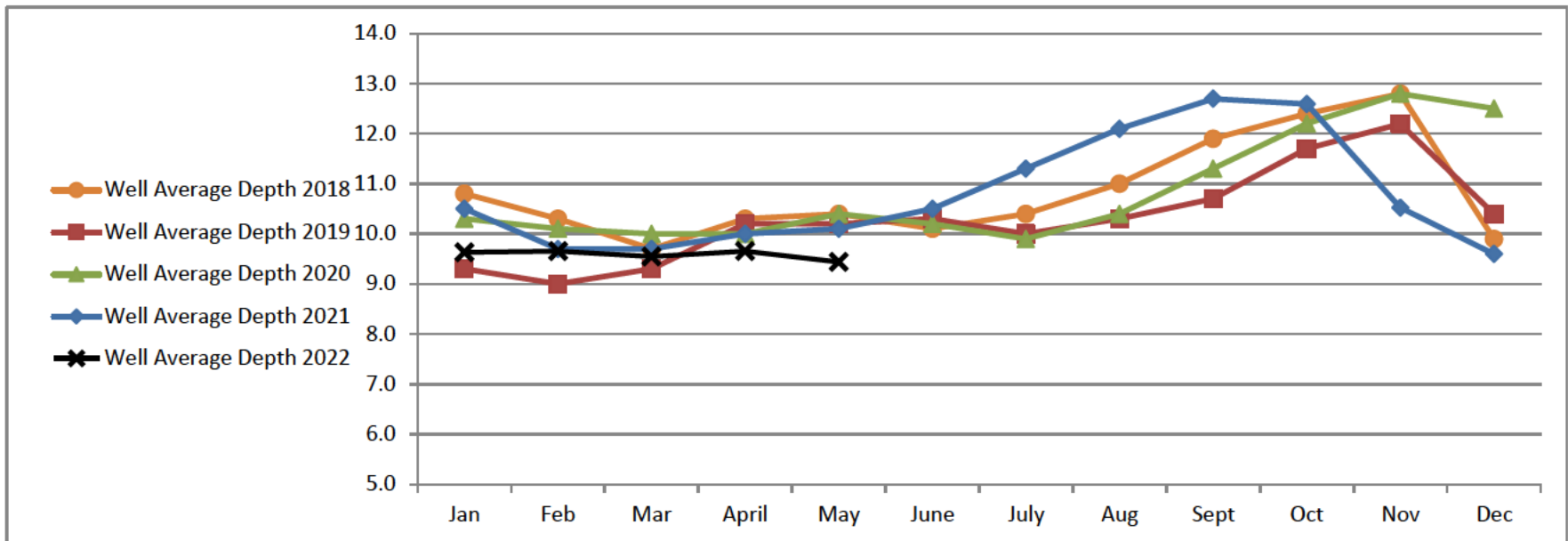
<b>2022</b>													
	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Total for 2022
Wastewater Influent	1,571,222	1,389,949	1,589,863	1,719,101	1,798,328								8,068,463
Wastewater Final Effluent (Month Cycle)	1,649,170	1,498,768	1,725,410	1,871,010	1,996,900								8,741,258
Adjusted Wastewater Influent (- State Flow)	1,522,839	1,356,607	1,549,685	1,690,058	1,608,515								7,727,704
Water Produced (month cycle)	1,683,299	1,654,800	1,924,903	2,059,394	2,175,259								9,497,655
Sewer Influent/Water Produced Ratio	0.93	0.84	0.83	0.84	0.83								N/A
Adjusted Sewer/Water Produced Ratio	0.91	0.82	0.81	0.82	0.74								N/A
Well 1 Water Production	798,864	892,663	1,308,402	1,210,189	1,818,687								6,028,805
Well 2 Water Production	884,435	762,137	616,502	849,204	356,572								3,468,850
Total Well Production	1,683,299	1,654,800	1,924,903	2,059,394	2,175,259								9,497,655
Water Well 1 Avg Depth to Water	9.8	9.8	9.7	9.8	9.6								N/A
Water Well 2 Avg Depth to Water	9.4	9.5	9.4	9.5	9.3								N/A
Average Depth to Water of Both Wells	9.6	9.7	9.5	9.7	9.4								N/A
Change in Average Depth to Water from 2021	-0.9	0.0	-0.2	-0.3	-0.7								N/A
Average Chloride mg/L at the Wells	<30	36	35	32	<30								N/A
State Wastewater Treated	48,383	33,342	40,178	29,043	189,813								340,759
State % of Total WW Flow	3%	2%	3%	3%	11%								N/A
Recycled Water Sold (Gallons)	0	0	0	0	0								0
Biosolids Removal (Gallons)	0	4,500	4,500	0	4,500								13,500
<b>WW Permit Limitation Exceeded</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>								<b>0</b>
<b>RW Permit Limitation Exceeded</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>								<b>0</b>
<b>Constituent Exceeded</b>	<b>None</b>	<b>None</b>	<b>None</b>	<b>None</b>	<b>None</b>								<b>N/A</b>
<b>Sample Limit</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>								<b>N/A</b>
<b>Sample Result</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>								<b>N/A</b>
<b>2021</b>													
	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Total for 2021
Wastewater Influent	2,399,103	1,705,622	1,820,175	1,763,875	1,619,717	1,901,547	2,158,434	1,943,680	1,675,426	1,703,610	1,507,913	2,546,220	22,745,322
Wastewater Final Effluent (Month Cycle)	2,546,130	1,747,000	1,874,290	1,827,000	1,826,280	2,057,550	2,281,620	1,997,150	1,837,180	1,801,220	1,613,060	2,699,710	24,108,190
Adjusted Wastewater Influent(- State Flow) *	2,148,485	1,645,420	1,765,245	1,705,967	1,552,211	1,825,611	2,078,540	1,854,274	1,603,573	1,644,544	1,471,062	2,368,128	21,663,060
Water Produced (month cycle)	1,851,150	1,682,402	1,907,250	2,114,147	2,080,786	2,385,297	2,699,083	2,171,145	2,100,384	1,955,870	1,743,588	1,887,877	24,578,981
Sewer Influent/Water Produced Ratio	1.30	1.05	0.95	0.83	0.78	0.80	0.88	0.92	0.80	0.87	0.87	1.35	N/A
Adjusted Sewer/Water Ratio	1.16	0.95	0.93	0.81	0.75	0.77	0.85	0.90	0.78	0.84	0.84	1.25	N/A
Average Depth of Both Wells	10.5	9.7	9.7	10.0	10.1	10.5	9.9	10.4	11.3	12.7	10.6	9.7	N/A
Change in Average Depth to Water from 2020	-0.2	0.4	0.3	0.0	0.3	-0.3	0.0	0.0	0.0	-0.5	2.2	2.8	N/A
Average Chloride mg/L at the Wells	352	169	77	41	31	30	-	-	-	<30	41	37	N/A
State Wastewater Treated	250,618	60,202	125,914	57,908	67,506	75,936	79,894	89,406	71,853	59,066	36,851	178,092	1,153,246
State % of Total WW Flow	10%	4%	7%	3%	4%	4%	4%	5%	4%	3%	2%	7%	N/A
Recycled Water Sold (Gallons)	0	0	0	0	0	0	0	0	0	0	0	0	0
Biosolids Removal (Gallons)	0	4,500	0	4,500	9,000	4,500	9,000	0	4,500	22,500	0	0	58,500
<b>WW Permit Limitation Exceeded</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>N/A</b>
<b>RW Permit Limitation Exceeded</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>N/A</b>
<b>Constituent Exceeded</b>	<b>None</b>	<b>None</b>	<b>None</b>	<b>None</b>	<b>None</b>	<b>None</b>	<b>None</b>	<b>None</b>	<b>None</b>	<b>None</b>	<b>None</b>	<b>None</b>	<b>N/A</b>
<b>Sample Limit</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>
<b>Sample Result</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>

**San Simeon Community Services District**

**Superintendent's Report**

**May 2022**

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec
<b>Well Average Depth 2018</b>	10.8	10.3	9.7	10.3	10.4	10.1	10.4	11.0	11.9	12.4	12.8	9.9
<b>Well Average Depth 2019</b>	9.3	9.0	9.3	10.2	10.2	10.3	10.0	10.3	10.7	11.7	12.2	10.4
<b>Well Average Depth 2020</b>	10.3	10.1	10.0	10.0	10.4	10.2	9.9	10.4	11.3	12.2	12.8	12.5
<b>Well Average Depth 2021</b>	10.5	9.7	9.7	10.0	10.1	10.5	11.3	12.1	12.7	12.6	10.5	9.6
<b>Well Average Depth 2022</b>	9.6	9.7	9.5	9.7	9.4							



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**3.A.iv Special Presentations and Reports:  
General Manager's Report  
Charlie Grace**



## GENERAL MANAGER'S REPORT

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### Item 3.A.v.

**GES Staff Activity** – Report on staff activities for the month of May 2022. Regular activities performed by staff include:

Processing of utility payments, customer service duties, answering phone calls, mailing of the regular monthly utility bills. Prepared and distributed the agenda and Board packet for a budget committee meeting, a regular Board and a special Board meeting.

GES Staff also attended to the following items:

- Responded to fifteen (15) written public records requests.

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### Update on District Grants:

**LCP Grant** – Submitted invoices for reimbursement.

**Prop 1 Grant** – No update from last month.

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### Update on District Projects and RFP's:

**Update on Coastal Hazard Response Plan (CHRP)** – Jeff Oliveira (Oliveira Environmental Consulting) will be providing a verbal status update.

**Update on the Instream Flow Management Plan** – In progress; field pumping tests complete. Anticipated completion date is November of 2022.

**Update on the Rate Study** – In progress.

**Update on the Hearst Encroachment Agreement** – In progress; the Wildlife Conservation Board is reviewing.

**Update on the Water Tank Project Update** – Discussed timing of easement with the property owner. Priority is the Reverse Osmosis Hearst Encroachment Agreement completion mentioned above.

**Update on Repair of Pico Avenue Beach Access (Bottom of Stairs)** – A request to review repair suggestions was sent to the Coastal Commission. Structural Engineer coordination was unsuccessful most likely due to San Simeon's remote location and project size.

**Update on RFP for Replacement to the Pipe Bridge** –Responsive bids will be presented to the Board at the July Board meeting.

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**Update on Steps for lifting Moratorium (presented at the October 2020 Board meeting).**

**Steps for Removal of Water Service Moratorium**

1. ~~Compile water usage data for the existing users to determine water quantity availability and determine Aquifer Safe Sustainable Water Yield (Completed 3/2022).~~
2. ~~Present Analysis of water availability compared to waitlist demand (Completed 3/2022).~~
3. ~~Address water quality issues install Reverse Osmosis System (Completed).~~
4. Contact persons on the water waitlist regarding continues plans to develop (removing this item from the task list unless otherwise directed by the Board).
5. Development of Instream Flow Management Plan (IFMP) and Program to Accommodate Affordable Housing (North Coast Plan) (In progress – estimated completion 12/2022).
6. Conduct an Environmental review and analysis California Environmental Quality Act (CEQA). (UWMP and IFMP may satisfy CEQA) (UWMP is complete).
7. ~~Conduct a Source Capacity Planning Study required by the State Water Resources Control Board, Division of Drinking Water. (Found not to be a requirement)~~
8. ~~Review and (potentially) modify the District's Ordinance 117 regarding water conservation. (No modification is necessary)~~
9. Develop process for reviewing and processing requests for will-serve letters (in progress anticipated that a draft will be presented at the June Board meeting).
10. Administrative Process to Repeal District Ordinance 102 – Water Connection Moratorium (in progress, anticipated that a draft will be presented at the June meeting).
11. Implement system of periodic review of water availability (currently described in Resolution 20-426, 4a).

**3.A.v. Special Presentations and Reports:  
District Financial Summary  
Cortney Murguia**

# SAN SIMEON COMMUNITY SERVICES DISTRICT



## 3.A.iv FINANCIAL SUMMARY

### Billing May 31, 2022

<b>April Billing Revenue</b>	<b>\$</b>	<b>92,805.91</b>
<b>May Billing Revenue</b>	<b>\$</b>	<b>83,261.84</b>
<b>Past Due (60+ days)</b>	<b>\$</b>	<b>4,711.74</b>

### ENDING BANK BALANCES

May 31, 2022

**PACIFIC PREMIER BANK:**

Money Market Account Closing Balance April 30, 2022	<b>\$</b>	<b>1,090,169.23</b>
Interest for May	<b>\$</b>	<b>27.78</b>
Money Market Account Closing Balance May 31, 2022	<b>\$</b>	<b>1,090,197.01</b>
Reserve Fund		<b>(250,000.00)</b>
Wait-list Deposits		<b>(94,148.60)</b>
Customer Deposits		<b>(8,400.00)</b>
<b>Available Funds</b>	<b>\$</b>	<b>737,648.41</b>

**General Checking Account May 31, 2022** **\$ 51,489.90**

**LAIF Closing Balance May 31, 2022** **\$ 562.06**

**Interest Money Market Account 2019** **\$ 22,529.11**

**Interest Money Market Account 2020** **\$ 12,206.44**

**Interest Money Market Account 2021** **\$ 1,104.91**

**Interest Money Market Account 2022** **\$ 145.63**

**SAN SIMEON COMMUNITY SERVICES  
HISTORICAL FISCAL REVIEW**

**FY 2018/2019**

Month	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Fiscal Total
State Billing			\$26,723.91			\$20,971.00			\$19,858.71			\$19,390.52	\$86,944.14
Property Tax	\$1,288.59		\$169.19	\$7,205.82	\$8,542.19	\$33,187.58	\$1,319.32	\$4,888.55	\$2,227.01	\$22,928.34	\$3,062.24	\$1,057.02	\$85,875.85
Water	\$41,336.59	\$45,279.14	\$41,178.74	\$34,050.67	\$30,760.16	\$24,353.21	\$29,009.60	\$27,745.06	\$24,146.67	\$35,445.24	\$29,158.01	\$38,455.33	\$400,918.42
Sewer	\$47,258.33	\$53,156.35	\$47,379.43	\$39,628.31	\$35,491.84	\$28,149.21	\$34,169.78	\$32,181.86	\$27,850.19	\$41,666.62	\$33,854.74	\$44,856.07	\$465,642.73
Service	\$7,111.73	\$7,113.60	\$7,113.60	\$7,113.60	\$7,079.40	\$7,079.40	\$7,147.80	\$7,079.40	\$7,079.40	\$7,079.40	\$7,045.20	\$7,079.40	\$85,121.93
Late Fees	\$461.43	\$201.49	\$290.08	\$168.71	\$600.53	\$135.60	\$178.43	\$146.51	\$126.87	\$177.46	\$111.54	\$272.66	\$2,871.31
Grant Funds				\$11,367.00		\$18,753.05							
Revenue	\$97,456.67	\$105,750.58	\$122,854.95	\$88,167.11	\$82,474.12	\$113,876.00	\$71,824.93	\$72,041.38	\$81,288.85	\$107,297.06	\$73,231.73	\$111,111.00	\$1,127,374.38
Expense	\$81,495.91	\$74,250.58	\$102,279.81	\$104,990.12	\$111,554.79	\$92,037.25	\$94,850.91	\$94,625.06	\$71,744.58	\$105,016.25	\$89,244.32	\$98,066.81	\$1,120,156.39
Balance	\$15,960.76	\$31,500.00	\$20,575.14	(\$16,823.01)	(\$29,080.67)	\$21,838.75	(\$23,025.98)	(\$22,583.68)	\$9,544.27	\$2,280.81	(\$16,012.59)	\$13,044.19	\$7,217.99
Water Sold Cu Ft	334631	367360	332914	275609	243491	195107	236456	227602	197397	288979	236030	311046	3,246,622
Water Sold Acre f	7.68	8.43	7.64	6.33	5.59	4.48	5.43	5.23	4.53	6.63	5.42	7.14	74.53

**FY 2019/2020**

Month	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Fiscal Total
State Billing			\$25,528.71			\$22,455.35			\$15,776.54			\$7,016.19	\$70,776.79
Property Tax	\$1,218.61	\$2,752.21	\$3,126.48	\$5,305.64	\$6,019.52	\$23,503.23	\$13,612.60	\$5,282.91	\$2,659.00	\$15,436.18	\$9,385.45	\$916.22	\$89,218.05
Water	\$41,718.97	\$39,623.52	\$40,324.01	\$43,808.36	\$32,208.00	\$23,432.56	\$33,732.14	\$34,067.23	\$24,268.55	\$17,909.86	\$28,582.31	\$36,460.31	\$396,135.82
Sewer	\$48,137.21	\$45,503.27	\$45,161.69	\$48,244.57	\$34,916.02	\$26,527.95	\$39,321.56	\$39,368.21	\$27,637.52	\$19,243.28	\$29,934.22	\$37,683.06	\$441,678.56
Service	\$7,113.60	\$7,045.20	\$7,079.40	\$7,451.10	\$7,489.26	\$7,344.54	\$7,525.44	\$7,453.08	\$7,489.26	\$7,489.26	\$7,489.26	\$7,453.08	\$88,422.48
Recycled Water													\$0.00
Late Fees	\$1,957.04	\$2,399.24	\$1,407.87	\$468.45	\$316.84	\$1,136.41	\$237.28	\$307.96	\$2,793.44	\$5,540.71	\$4,647.78	\$3,802.45	\$25,015.47
Grant Funds			\$8,750.00	\$167,376.61						\$1,485.90		\$8,369.50	\$185,982.01
Revenue	\$100,145.43	\$97,323.44	\$122,628.16	\$105,278.12	\$80,949.64	\$104,400.04	\$94,429.02	\$86,479.39	\$80,624.31	\$65,619.29	\$80,039.02	\$93,331.31	\$1,111,247.17
Expense	\$90,205.84	\$67,705.50	\$94,401.58	\$97,595.50	\$87,822.01	\$86,173.97	\$85,716.44	\$75,643.11	\$62,582.54	\$73,942.83	\$90,232.61	\$79,762.52	\$991,784.45
Balance	\$9,939.59	\$29,617.94	\$28,226.58	\$7,682.62	(\$6,872.37)	\$18,226.07	\$8,712.58	\$10,836.28	\$18,041.77	(\$8,323.54)	(\$10,193.59)	\$13,568.79	\$119,462.72
Water Sold Cu Ft	336845	319458	323518	329822	242893	179311	260006	261505	185972	137196	217871	274085	3,068,482
Water Sold Acre f	7.73	7.33	7.43	7.57	5.58	4.12	5.97	6.00	4.27	3.15	5.00	6.29	70.44

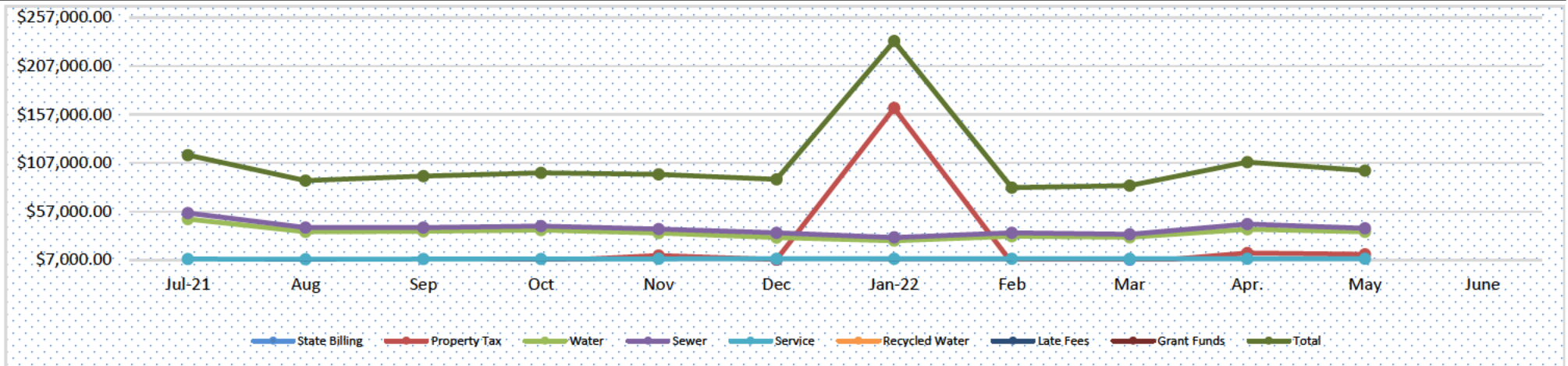
**FY 2020/2021**

Month	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Fiscal Total
State Billing			\$4,898.26			\$4,898.26			\$9,978.14			\$5,654.87	\$25,429.53
Property Tax	\$2,336.92	\$751.11	\$11.88	\$6,945.71	\$5,461.44	\$26,458.17	\$12,827.64	\$1,063.98	\$5,505.65	\$8,582.80	\$15,086.53	\$2,262.87	\$87,294.70
Water	\$40,209.97	\$54,512.44	\$41,179.63	\$40,129.44	\$30,132.26	\$30,099.00	\$31,207.86	\$28,567.08	\$27,866.11	\$39,907.47	\$31,637.78	\$39,875.45	\$435,324.49
Sewer	\$45,546.00	\$60,488.59	\$45,320.14	\$44,227.62	\$32,486.93	\$31,269.68	\$29,285.81	\$31,276.88	\$30,546.56	\$44,784.48	\$34,717.31	\$44,261.59	\$474,211.59
Service	\$7,830.48	\$7,834.18	\$7,910.24	\$7,872.17	\$8,062.36	\$7,948.27	\$7,910.24	\$7,910.24	\$7,834.18	\$7,796.15	\$7,910.24	\$7,872.21	\$94,690.96
Recycled Water	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Late Fees	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Grant Funds	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Revenue	\$95,923.37	\$123,586.32	\$99,320.15	\$99,174.94	\$76,142.99	\$100,673.38	\$81,231.55	\$68,818.18	\$81,730.64	\$101,070.90	\$89,351.86	\$99,926.99	\$1,116,951.27
Expense	\$87,144.37	\$81,902.63	\$114,623.38	\$160,041.02	\$98,357.85	\$137,804.21	\$111,151.88	\$106,602.36	\$84,771.53	\$71,795.69	\$91,754.68	\$72,434.79	\$1,218,384.39
Balance	\$8,779.00	\$41,683.69	(\$15,303.23)	(\$60,866.08)	(\$22,214.86)	(\$37,130.83)	(\$29,920.33)	(\$37,784.18)	(\$3,040.89)	\$29,275.21	(\$2,372.82)	\$27,492.20	(\$101,403.12)
Water Sold Cu Ft	292033	387244	297886	291236	218802	217498	215864	209660	203888	291683	230285	288809	3,144,888
Water Sold Acre f	6.70	8.89	6.84	6.69	5.02	4.99	4.96	4.81	4.68	6.70	5.29	6.63	72.20



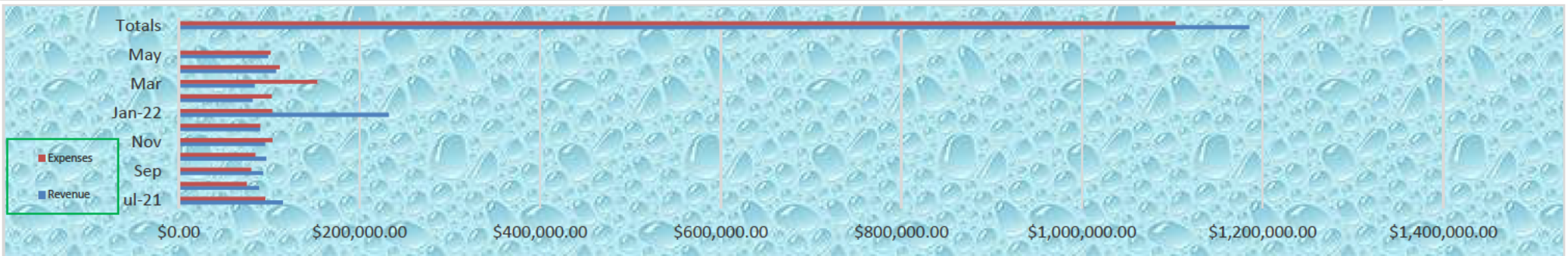
### DISTRICT REVENUE FY 2021/2022

	Jul-21	Aug	Sep	Oct	Nov	Dec	Jan-22	Feb	Mar	Apr.	May	June	Totals
State Billing			\$6,340.85			\$7,273.93			\$7,273.93				\$20,888.71
Property Tax	\$115.78	\$1,381.14	\$10.01	\$5,809.34	\$11,583.42	\$7,622.03	\$163,743.57	\$4,095.69	\$4,104.27	\$14,321.21	\$12,933.74		\$225,720.20
Water	\$49,269.78	\$36,018.10	\$36,656.78	\$37,820.36	\$34,769.42	\$30,061.95	\$27,060.11	\$31,533.31	\$30,350.63	\$38,738.36	\$36,177.32		\$388,456.12
Sewer	\$55,516.22	\$40,331.83	\$40,336.81	\$42,047.97	\$38,874.20	\$35,068.70	\$30,298.87	\$35,079.28	\$33,573.78	\$44,078.35	\$39,679.66		\$434,885.67
Service	\$7,910.24	\$7,834.18	\$7,977.48	\$8,080.85	\$8,272.49	\$8,272.49	\$8,272.49	\$8,232.71	\$8,272.49	\$8,232.71	\$8,312.27		\$89,670.40
Recycled Water													\$0.00
Late Fees	\$2,349.85	\$3,168.75	\$2,222.38	\$3,159.93	\$1,854.16	\$1,966.24	\$3,291.71	\$2,803.97	\$211.71	\$2,566.37	\$1,996.72		\$25,591.79
Grant Funds	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00
<b>Total</b>	<b>\$115,161.87</b>	<b>\$88,734.00</b>	<b>\$93,544.31</b>	<b>\$96,918.45</b>	<b>\$95,353.69</b>	<b>\$90,265.34</b>	<b>\$232,666.75</b>	<b>\$81,744.96</b>	<b>\$83,786.81</b>	<b>\$107,937.00</b>	<b>\$99,099.71</b>		<b>\$1,185,212.89</b>
Water Sold Cu Ft	357524	261467	253458	262346	241618	210787	189269	219034	211521	270041	249738		2726803
Water Sold Acre ft	8.21	6.00	5.82	6.02	5.55	4.84	4.35	5.03	4.86	6.20	5.73		62.60



### REVENUE VS EXPENSES

	Jul-21	Aug	Sep	Oct	Nov	Dec	Jan-22	Feb	Mar	Apr.	May	June	Totals
Revenue	\$115,161.87	\$88,734.00	\$93,544.31	\$96,918.45	\$95,353.69	\$90,265.34	\$232,666.75	\$81,744.96	\$83,786.81	\$107,937.00	\$99,099.71		\$1,185,212.89
Expenses	\$95,803.89	\$75,209.49	\$80,233.53	\$84,995.77	\$103,695.19	\$90,282.75	\$103,403.23	\$102,972.34	\$153,478.50	\$111,977.33	\$101,809.55		\$1,103,861.57
Balance	\$19,357.98	\$13,524.51	\$13,310.78	\$11,922.68	(\$8,341.50)	(\$17.41)	\$129,263.52	(\$21,227.38)	(\$69,691.69)	(\$4,040.33)	(\$2,709.84)		\$81,351.32



### **3.B.vi. AD-Hoc & Standing Committee Reports:**



## **AD-HOC & STANDING COMMITTEE REPORTS**

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List of Committee Members:

**i. Camping on District Streets Committee Member:**

Director Donahue.

**ii. Coastal Hazards Response Plan (CHRP) Committee Members:**

Director de la Rosa and Chairperson Kellas.

**iii. Budget Committee Members:**

Director Daniel de la Rosa, Michael Hanchett, Miguel Sandoval, Luz Hernandez,

**iv. Water Committee Members:**

Michael Hanchett, Director Daniel de la Rosa, Chuck Grash, Albert Barretto

**4.A. Consent Agenda Items:  
ADOPTION OF RESOLUTION 22-449 TO CONTINUE VIRTUAL  
MEETINGS PURSUANT TO THE PROVISIONS OF AB 361.**



## CONSENT AGENDA ITEM STAFF REPORT

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### ITEM 4.A. ADOPTION OF RESOLUTION 22-449 TO CONTINUE VIRTUAL MEETINGS PURSUANT TO THE PROVISIONS OF AB 361.

#### Summary

At a Special Meeting on September 30, 2021, the Board approved District Resolution 21-433 to continue virtual meetings of the Board of Directors and District committees pursuant to AB 361. AB 361 requires periodic review of the determination for a legislative body to continue to meet via teleconference, and if a state of emergency remains active, then no later than 30 days after meeting via teleconference, the body must make a subsequent finding that it “has reconsidered the circumstances of the state of emergency” and determined that in-person meetings continue to pose a risk to public health. During the May 26, 2022 Special meeting, the Board approved Resolution 22-448 which extended the “state of emergency” for an additional 30 days. Resolution 22-449 extends the “state of emergency” for an additional 30 days to allow continued virtual meetings.

#### Possible Options:

- 1) The Board may direct the meetings be held in person.
- 2) The Board may direct that the meetings remain being held via teleconference.

Enc: Resolution 22-449

**RESOLUTION NO. 22-449**

**A RESOLUTION OF THE BOARD OF DIRECTORS OF THE SAN SIMEON  
COMMUNITY SERVICES DISTRICT PROCLAIMING A LOCAL EMERGENCY  
PERSISTS, RE-RATIFYING THE PROCLAMATION OF A STATE OF EMERGENCY  
BY THE GOVERNOR ISSUED ON MARCH 4, 2020, AND AUTHORIZING REMOTE  
TELECONFERENCE MEETINGS OF THE LEGISLATIVE BODIES OF THE SAN  
SIMEON COMMUNITY SERVICES DISTRICT FOR THE PERIOD OF JUNE 14, 2022,  
TO JULY 14, 2022, PURSUANT TO BROWN ACT PROVISIONS**

**Recitals**

WHEREAS, the San Simeon Community Services District ("District") is committed to preserving and nurturing public access and participation in meetings of the Board of Directors; and

WHEREAS, all meetings of the District's legislative bodies are open and public, as required by the Ralph M. Brown Act (Gov. Code, §§ 54950 – 54963), so that any member of the public may attend, participate, and watch the District's legislative bodies conduct their business; and

WHEREAS, the Brown Act, Government Code section 54953(e), makes provision for remote teleconferencing participation in meetings by members of a legislative body, without compliance with the requirements of Government Code section 54953(b)(3), subject to the existence of certain conditions; and

WHEREAS, a required condition is that a state of emergency is declared by the Governor pursuant to Government Code section 8625, proclaiming the existence of conditions of disaster or of extreme peril to the safety of persons and property within the state caused by conditions as described in Government Code section 8558; and

WHEREAS, a proclamation is made when there is an actual incident, threat of disaster, or extreme peril to the safety of persons and property within the jurisdictions that are within the District's boundaries, caused by natural, technological or human-caused disasters; and

WHEREAS, it is further required that state or local officials have imposed or recommended measures to promote social distancing, or, the legislative body meeting in person would present imminent risks to the health and safety of attendees; and

WHEREAS, the Board of Directors previously adopted a Resolution, Number 21-433 on September 30, 2021, finding that the requisite conditions exist for the legislative bodies of the District to conduct remote teleconference meetings without compliance with paragraph (3) of subdivision (b) of section 54953; and

WHEREAS, as a condition of extending the use of the provisions found in section 54953(e), the Board of Directors must reconsider the circumstances of the state of emergency that exists in the District, and the Board of Directors has done so; and

WHEREAS, emergency conditions persist in the District, specifically, the State of Emergency declared by Governor Newsom on March 4, 2020, due to COVID-19, and strong recommendations by the California Department of Public Health that all persons, regardless of vaccination status, continue to undertake social distancing measures including wearing masks while in indoor public settings; and

WHEREAS, the Board of Directors does hereby find that the rise in SARS-CoV-2 Delta and Omicron variants have caused, and will continue to cause, conditions of peril to the safety of persons within the District that are likely to be beyond the control of services, personnel, equipment, and facilities of the District, and desires to affirm a local emergency exists and re-ratify the proclamation of state of emergency by the Governor of the State of California; and

WHEREAS, as a consequence of the local emergency persisting, the Board of Directors does hereby find that the legislative bodies of the District shall continue to conduct their meetings without compliance with paragraph (3) of subdivision (b) of Government Code section 54953, as authorized by subdivision (e) of section 54953, and that such legislative bodies shall continue to comply with the requirements to provide the public with access to the meetings as prescribed in paragraph (2) of subdivision (e) of section 54953; and

WHEREAS, the Board of Directors will ensure that the public has access to meetings and the opportunity to participate in meetings in the interest of transparency and as required by AB 361.

NOW, THEREFORE, IT IS HEREBY RESOLVED by the Board of Directors of the San Simeon Community Services District, as follows:

1. Recitals. The Recitals set forth above are true and correct and are incorporated into this Resolution by this reference.
2. Affirmation that Local Emergency Persists. The Board of Directors hereby considers the conditions of the state of emergency in the District and proclaims that a local emergency persists throughout the District, and COVID-19 has caused, and will continue to cause, conditions of peril to the safety of persons within the District that are likely to be beyond the control of services, personnel, equipment, and facilities of the District.
3. Re-ratification of Governor's Proclamation of a State of Emergency. The Board hereby ratifies the Governor of the State of California's Proclamation of State of Emergency, effective as of its issuance date of March 4, 2020.
4. Remote Teleconference Meetings. The General Manager and Staff of the District are hereby authorized and directed to take all actions necessary to carry out the

intent and purpose of this Resolution including, continuing to conduct open and public meetings in accordance with Government Code section 54953(e) and other applicable provisions of the Brown Act.

- 5. Effective Date of Resolution. This Resolution shall take effect immediately upon its adoption and shall be effective until the earlier of (i) July 14, 2022, or such time the Board of Directors adopts a subsequent resolution in accordance with Government Code section 54953(e)(3) to extend the time during which the legislative bodies of the District may continue to teleconference without compliance with paragraph (3) of subdivision (b) of section 54953.

**ADOPTED** by the Board of Directors of the San Simeon Community Services District on June 14, 2022, by the following roll call votes:

AYES:  
NOES:  
ABSENT:  
ABSTAINED:

\_\_\_\_\_  
President, Board of Directors of the  
San Simeon Community Services District

**ATTEST:**

\_\_\_\_\_  
Charles Grace, General Manager of the  
San Simeon Community Services District

**APPROVED AS TO FORM:**

\_\_\_\_\_  
Jeffrey A. Minnery, District Counsel



**4.B. Consent Agenda Items:  
REVIEW AND APPROVAL OF MINUTES FOR THE REGULAR  
MEETING ON MAY 10, 2022.**

**MEETING MINUTES**  
**SAN SIMEON COMMUNITY SERVICES DISTRICT**  
**BOARD OF DIRECTORS REGULAR BOARD MEETING**  
**Tuesday, May 10, 2022**  
**5:00 pm**

Pursuant to San Simeon CSD Resolution 22-445 and incompliance with AB 361 this meeting occurred as a virtual teleconference using the Zoom app.

**Internet Meeting Location – Via ZOOM**

**1. REGULAR SESSION @ 5:02 PM**

- A. Chairperson Kellas – Present
- Vice-Chairperson Giacoletti – Present (joined the meeting after roll call during the Health Care District presentation)
- Director de la Rosa – Present
- Director Donahue - Present

**2. PUBLIC COMMENT FOR ITEMS NOT ON THE AGENDA:**

**Public Comment –**

- (1:40) Henry Krzciuk commented that the General Manager and Office manager were refusing to provide candidate information to the public.
- (3:40) Julie Tacker commented on the appointment process related to the Board member vacancy.
- (6:00) Chairperson Kellas called on April Dury. April Dury did not respond.

**3. SPECIAL PRESENTATIONS AND REPORTS:**

**A. STAFF REPORTS:**

- i. **Sheriff’s Report** – There was no report provided for April.
- ii. **CHP Report** – There was no representative present. Cortney Murguia provided a summary of April activities.
- iii. Cambria Healthcare District Presentation on Ambulance Station (9:35) – Representatives from the Cambria Healthcare District presented a video related to the need a new ambulance facility for the community.  
**Public Comment –**
  - (19:40) Henry Krzciuk commented.
  - (22:50) Jeffrey Stulberg commented.
  - (25:45) April Dury commented.
- iv. **Superintendent’s Report** (27:30) – Charlie Grace provided a summary of April activities.
- v. **General Manager’s Report** (29:15) – Charlie Grace provided a summary of April activities.
- vi. **District Financial Summary** (36:20) – Charlie Grace provided a summary of the April financials.
- vii. **District Counsel’s Report** (38:20) – Jeff Minnery provided a summary of April activities.
- viii. **Board Member Report** (39:25) – Chairperson Kellas provided information related to the horse trough consumption. Charlie Grace also provided historical background on this matter, he suggested that as a good faith effort the connection remain in place.

**B. AD-HOC & STANDING COMMITTEE REPORTS:**

- i. **Status Update** – Coastal Hazard Response Plan (CHRP) – None provided.
- ii. **Status Update** – Budget Committee – Mike Hanchett provided a summary of the Budget committee meeting.
- iii. **Status Update** – Water Committee - No report was provided.

**Public Comment –**

(44:00) Julie Tacker commented.  
(47:00) Jeff Stolberg commented.  
(48:10) Henry Krzciuk commented.

**4. CONSENT AGENDA ITEMS:**

- A. REVIEW AND APPROVAL OF MINUTES FOR THE REGULAR MEETING ON APRIL 12, 2022.**
- B. REVIEW AND APPROVAL OF MINUTES FOR THE SPECIAL MEETING ON APRIL 22, 2022.**
- C. REVIEW AND APPROVAL OF DISBURSEMENTS JOURNAL.**
- D. ADOPTION OF RESOLUTION 22-447 TO CONTINUE VIRTUAL MEETINGS PURSUANT TO THE PROVISIONS OF AB 361.**
- E. APPROVAL OF DIRECTOR MICHAEL DONAHUE TO WORK WITH THE COUNTY OF SAN LUIS OBISPO ON A NO CAMPING ORDINANCE FOR COUNTY MAINTAINED STREETS IN THE BOUNDARY OF SAN SIMEON AND A NO CAMPING ORDINANCE FOR SSCSD MAINTAINED STREETS.**

(52:33) Chairperson Kellas commented on item 4A page 25 of the Board packet asking for a revision on Item 3B i. addition of the word “no” into the sentence camping ordinance.

Public Comment –  
There was no public comment.

Chairperson Kellas made a motion to approve consent agenda items 4A-4E with suggested edits to Item 3B.i.

Motion: Chairperson Kellas  
2nd: Director de la Rosa  
Vote: 3/1  
Abstain: Donahue

Roll Call: Kellas: Yes      Giacoletti: Yes      de la Rosa: Yes      Donahue: Abstain

**5. BUSINESS ACTION ITEMS: (57:20)**

- A. CONSIDERATION OF CANDIDATES TO REPLACE THE BOARD OF DIRECTOR VACANCY CREATED BY THE RESIGNATION OF ROBERTA REINSTEIN AND BOARD APPOINTMENT OF THE NEW DIRECTOR. (57:30)**

Jeff Minnery clarified that the District had the discretion to nominate and appoint a candidate.

Chairperson Kellas called on Jacqueline Diamond to speak about the application Ms. Diamond had submitted for the Board member vacancy.

Henry Krzciuk commented about issues with governance and the appointment process, stating that the County had never been notified.

Chairperson Kellas stated that the District had notified the County of the Board vacancy on March 9, 2022.

(1:05:42) A motion was made to direct counsel and staff to send a letter to the County Board of Supervisors requesting a ninety-day (90) extension to the District to appoint a new Board member.

Public Comment –

(1:06:10) Michael Hanchett commented.

(1:07:46) Julie Tacker commented.

(1:10:57) Henry Krzciuk commented.

(1:12:45) Chairperson Kellas stated for the Board that she had reviewed the Government code related to the appointment process, she went on to reiterate that the County had been notified of the Board vacancy.

(1:13:15) Director Donahue spoke stating that he agreed with Henry Krzciuk. He stated that the County needed to step in.

(1:14:35) Charlie Grace stated that the County had been notified of the vacancy, in the same fashion that the District always followed to notify the County of the vacancy. He went on to further explain that Staff had not refused to distribute the applications, that staff stated the applications will be distributed in two days with the board packet.

(1:15:58) Jeff Minnery provided additional information related to Government Code 1780. Further stating that the District had permissive discretion to appoint a Board member.

(1:17:40) Chairperson Kellas asked for a second to her original motion (1:05:42)

Motion: Chairperson Kellas

2nd: Director de la Rosa

Vote: 3/1

Abstain:

Roll Call: Kellas: Yes          Giacoletti: Absent          de la Rosa: Yes          Donahue: No

(1:18:18) Vice-Chairperson Giacoletti dropped off the meeting for the roll-call vote. The motion failed.

(1:18:39) Director Donahue made a motion that the District hand this over to the Board of Supervisors to make their decision and not wait the 90 days. There was no second.

(1:20:00) Director Donahue and Jeff Minnery further discussed the appointment process and the timeline.

(1:24:25) Vice-Chairperson Giacoletti rejoined the meeting.

(1:24:38) Chairperson Kellas made a motion to direct counsel and staff to send a letter to

the County Board of Supervisors requesting a ninety-day (90) extension to the District to appoint a new Board member.

Motion: Director Donahue  
2nd: Director de la Rosa  
Vote: 4/0  
Abstain:

Roll Call: Kellas: Yes                      Giacoletti: Yes                      de la Rosa: Yes                      Donahue: Yes

**B. REVIEW, CONSIDERATION AND APPROVAL OF A PROPOSAL FROM J.F. BRENNAN COMPANY, INC. TO REPAIR THE OCEAN OUTFALL NOT TO EXCEED THE AMOUNT OF \$115,000.00.**  
(1:26:40)

Charlie Grace introduced the item. He asked that the amount to exceed be \$120,000.00.

Public Comment –  
(1:29:00) Henry Krzciuk commented.  
(1:30:35) Julie Tacker commented.  
(1:32:20) Jeff Stolberg commented.

(1:33:05) Director Donahue commented on the need to add additional funds to the not to exceed amount.

(1:35:00) Chairperson Kellas recused herself.

(1:35:50) Cortney Murguia asked Director de la Rosa if Vice-Chairperson Giacoletti was still on the line. He stated that she was not.

(1:36:24) A motion was made to approve the proposal from J.F. Brennan Company not to exceed the amount of \$115,000.00. (There was no quorum)

This item was postponed until after the closed session occurred.

**6. CLOSED SESSION: (1:39:40)**

Public Comment –  
(1:40:00) Henry Krzciuk commented.  
(1:42:55) Julie Tacker commented.

**A. CONFERENCE WITH LEGAL COUNSEL – EXISTING LITIGATION**

Pursuant to Government Code section §54956.9(d)(1)  
Name of Cases – Robert Hather v. San Simeon Community Services District, et al., U.S. District Court C1:Case No. 2:21-cv-04711  
Robert Hather v. San Simeon Community Services District, et al., SLO Superior Court Case No. 22CVP-0008

**B. CONFERENCE WITH LEGAL COUNSEL – ANTICIPATED LITIGATION**

Exposure to litigation pursuant to paragraph (2) of subdivision (d) of Government Code Section §54956.9 – Ron Hurlbert

**\*\*\*\*RECONVENE TO OPEN SESSION\*\*\*\***

(1:47:31) Kellas, de la Rosa, and Giacoletti rejoined the meeting.

**Report on Closed Session:** The Board voted to ratify the settlement agreement with Robert Hather. Item B. There was no reportable action.

(1:49:07) A motion was made to approve the proposal from J.F. Brennan Company not to exceed the amount of \$115,000.00. (Chairperson Kellas made the motion and then recused herself from this matter).

(1:50:15) Jeff Minnery contacted Director Donahue via the phone.

A motion was made to approve the proposal from J.F. Brennan Company to repair the ocean outfall not to exceed the amount of \$115,000.00.

(1:52:00) Director Donahue rejoined the meeting.

(1:52:20) A motion was made to approve the proposal from J.F. Brennan Company to repair the ocean outfall not to exceed the amount of \$115,000.00.

Motion: de la Rosa  
2nd: Vice-Chairperson Giacoletti  
Vote: 3/1  
Absent: Kellas

Roll Call: Kellas: Absent      Giacoletti: Yes      de la Rosa: Yes      Donahue: Yes

**7. BOARD/STAFF GENERAL DISCUSSIONS AND PROPOSED AGENDA ITEMS – None**

**8. ADJOURNMENT @ 7:57 PM**

**4.C. Consent Agenda Items:  
REVIEW AND APPROVAL OF MINUTES FOR THE  
SPECIAL MEETING ON MAY 26, 2022.**

**MEETING MINUTES**  
**SAN SIMEON COMMUNITY SERVICES DISTRICT**  
**BOARD OF DIRECTORS SPECIAL BOARD MEETING**  
**Thursday, May 26, 2022**  
**10:00 am**

Pursuant to San Simeon CSD Resolution 22-447 and incompliance with AB 361 this meeting occurred as a virtual teleconference using the Zoom app.

**Internet Meeting Location – Via ZOOM**

**1. OPEN SESSION: @ 10:04 AM -**

- A. Chairperson Kellas – Present
- Vice-Chairperson Giacoletti – Present
- Director de la Rosa – Present
- Director Donahue – Absent

**2. CONSENT AGENDA ITEMS:**

**A. ADOPTION OF RESOLUTION 22-448 TO CONTINUE VIRTUAL MEETINGS PURSUANT TO THE PROVISIONS OF AB 361.**

Public Comment – None

(1:16) A motion was made to approve Resolution 22-448.

Motion: Chairperson Kellas  
2nd: None  
Vote: 3/1  
Absent: Donahue

Roll Call: Kellas: Yes      Giacoletti: Yes      de la Rosa: Yes      Donahue: Absent

**3. BUSINESS ACTION ITEMS: (1:50)**

**DIRECTION REGARDING A REQUEST FOR PROPOSAL RELATED TO SERVICES FOR OPERATIONS, MAINTENANCE AND GENERAL MANAGER SERVICES. (2:15)**

Charlie Grace recused himself from this item stating a possible financial conflict.

Chairperson Kellas introduced the item.  
(3:40) Director de la Rosa rejoined the meeting.

Public Comment –  
(3:55) Henry Krzciuk commented.

(7:22) A motion was made to have Oliveira Environmental Consulting to work with District Counsel to provide an RFP.



Motion: Chairperson Kellas  
2nd: Director de la Rosa  
Vote: 2/1  
Absent: Donahue  
Abstain: Giacoletti

Roll Call: Kellas: Yes      Giacoletti: Abstain      de la Rosa: Yes      Donahue: Absent

**AUTHORIZATION FOR STAFF TO RETAIN A CONSULTANT, DANIEL HEIMEL (CONFLUENCE ENGINEERING), TO PROVIDE SERVICES RELATED TO THE WATER MORATORIUM, ISSUES THEREAFTER AND UTILITY RELATED ISSUES. (8:55)**

Cortney Murguia introduced the item.

Public Comment –  
(11:35) Henry Krzciuk commented.

(13:32) Charlie Grace rejoined the meeting. He provided additional information related to the type of work that Confluence Engineering would be performing for the District compared to existing consultants that provide other types of services.

(14:50) A motion was made to authorize staff to retain Daniel Heimel to provide services related to the water moratorium issues thereafter and utility related issues.

Motion: Chairperson Kellas  
2nd: Director de la Rosa  
Vote: 2/1  
Absent: Donahue

Roll Call: Kellas: Yes      Giacoletti: No      de la Rosa: Yes      Donahue: Absent

Chairperson Kellas stated that item was tabled until the next Board meeting.

**DISCUSSION AND REVIEW OF THE FISCAL YEAR BUDGET 2022/2023. (18:42)**

Mike Hanchett provided a thorough and detailed presentation of the draft Budget.

Public Comment –  
(27:58) Henry Krzciuk commented.

(32:09) Mike Hanchett commented and then continued his presentation related to the budget.

Public Comment –  
(51:15) Henry Krzciuk commented.  
(54:30) Mike Hanchett commented.

(57:52) Director de la Rosa left the meeting. This resulted in the lack of a quorum so the Board meeting was adjourned.

**4. ADJOURNMENT @ 11:01 PM**

**4.D. Consent Agenda Items:  
REVIEW AND APPROVAL OF DISBURSEMENTS  
JOURNAL.**

**SAN SIMEON COMMUNITY SERVICES DISTRICT**  
**Disbursements Journal**  
 June 2022

Type	Date	Num	Name	Memo	Paid Amount
<b>Additional Disbursements May 2022, issued after May BOD meeting</b>					
Bill Pmt -Check	05/26/2022	2476	PG&E	Electricity Street Lights Acct 7190979697-2. Bill dated 05/16/22.	-202.33
Bill Pmt -Check	05/26/2022	2475	Jeffrey D. Stulberg Client Trust Acct	Hather Settlement Agreement. Paid 05/26/2022.	-50,000.00
					<b><u>-50,202.33</u></b>
<b>June 2022 Disbursements</b>					
Paycheck	06/14/2022	2430	GWEN KELLAS	Board Service May 2 through June 1, 2022.	-184.70
Paycheck	06/14/2022	2431	MARY P GIACOLETTI	Board Service May 2 through June 1, 2022.	-184.70
Bill Pmt -Check	06/14/2022	2432	Days Inn San Simeon/SRK Investmt Inc	Customer security deposit refund for accounts 23 and 86. Eff 06/01/2022.	-100.00
Bill Pmt -Check	06/14/2022	2433	Adamski Moroski Madden Cumberland & Green	General legal services through 04/30/22. Inv 57716 dated 5/19/22.	-8,359.50
Bill Pmt -Check	06/14/2022	2434	Adamski Moroski Madden Cumberland & Green	Legal fees re: Hather litigation through 4/30/22. Inv 57717 dated 5/19/22.	-12,996.54
Bill Pmt -Check	06/14/2022	2435	California Rural Water Association	Membership dues for July 2022 - June 2023. Invoice due date 07/01/2022.	-465.00
Bill Pmt -Check	06/14/2022	2436	Cooperative Strategies	Prof svcs re: Trustee Area Creation to move toward By-Trustee-Area elections per CVRA. Inv 2135523 dated 4/30/22.	-8,100.00
Bill Pmt -Check	06/14/2022	2437	Kathleen Fry Bookkeeping Services	Bookkeeping services May 2022. Inv CSD-2022-05 dated 05/31/22.	-1,500.00
Bill Pmt -Check	06/14/2022	2438	Lori Mather Video Services	Video services for Reg BOD Mtg 06/14/22, Spcl mtg 5/26/22.. Invoice #6/1/22.	-600.00
Bill Pmt -Check	06/14/2022	2439	McClatchy Company LLC	Public Notice in Tribune 4/3/22. RFP for pipe bridge replacement. Invoice 112836 dated 4/30/22.	-48.99
Bill Pmt -Check	06/14/2022	2440	Simply Clear Marketing & Media	Monthly Website Service and Mgt fee service period 06/21/22 - 07/20/22 Inv 43528 dated 5/18/22.	-450.00
Bill Pmt -Check	06/14/2022	2441	SLO County - Environmental Health	Cross Connection admin cost for facility id FA0004646. Inv 0138035 dated 5/9/2022.	-44.20
Bill Pmt -Check	06/14/2022	2442	Stillwater Sciences	Pico Creek instream flow management plan services through 5/1/22. Inv 9840004 dated 5/20/22.	-6,241.50
Bill Pmt -Check	06/14/2022	2443	Toste Construction, Inc.	Provide and install parking restriction signs. Inv 8878 dated 5/10/22.	-4,550.00
Bill Pmt -Check	06/14/2022	2444	Grace Environmental Services	Operations Management, Electrical and Maintenance Fees June 2022. Inv # 1540 dated 6/1/22.	-56,189.95
Check	06/25/2022	Elec Pymt	CalPERS Fiscal Svcs Div	Retiree Health monthly premium.	-383.85
Check	06/25/2022	Elec Pymt	CalPers Fiscal Svcs Divn	Monthly Unfunded Accrued Liability payment. Cust. ID # 7226734344.	-1,349.42

**SAN SIMEON COMMUNITY SERVICES DISTRICT**  
**Disbursements Journal**  
 June 2022

Type	Date	Num	Name	Memo	Paid Amount
Liability Check	06/25/2022	Elec Pymt	United States Treasury (US Treasury)	Payroll tax payment for paychecks issued current month.	-61.20
<b>TOTAL</b>					<b><u>-101,809.55</u></b>

**4.E. Consent Agenda Items:  
ADOPTION OF RESOLUTION 22-450 APPROVING THE  
PROPOSITION 4 APPROPRIATION LIMIT FOR THE  
FISCAL YEAR 2022-2023.**



## **CONSENT AGENDA ITEM STAFF REPORT**

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### **ITEM 4.E. ADOPTION OF RESOLUTION 22-450 APPROVING THE PROPOSITION 4 APPROPRIATION LIMIT FOR THE FISCAL YEAR 2022-2023.**

#### Summary:

The appropriation limit amount calculation is based on information provided from the Department of Finance for the State of California. A copy of the data used to make the amount determination has been included with the staff report. Each year the appropriation limit is placed in front of the Board for their review and approval.

#### Recommendation:

Staff requests approval of Resolution 22-450.

Enc: Resolution 22-450  
Memo from Legal Counsel  
2022 Notice from Department of Finance

**RESOLUTION NO. 22-450**

**RESOLUTION OF THE BOARD OF DIRECTORS OF THE SAN SIMEON  
COMMUNITY SERVICES DISTRICT APPROVING THE PROPOSITION 4  
APPROPRIATION LIMIT FOR THE FISCAL YEAR 2022-2023**

**WHEREAS**, the San Simeon Community Services District (the "District") is a community services district duly formed under California Government Code Section 61000 et seq. to provide community services within the District's service area; and

**WHEREAS**, Government Code Section 7900 et seq. and Government Code Section 61113 provide that each year, the governing body of each local jurisdiction shall, by resolution, establish its appropriations limit pursuant to Article XIII B of the California Constitution at a regularly scheduled meeting or a noticed special meeting; and

**WHEREAS**, the State of California Department of Finance provides the annual change in the California per capita personal income and population changes in the unincorporated portions of San Luis Obispo County, which are used to calculate the appropriations limit for the District; and

**WHEREAS**, the calculation factor for the appropriation limit in Fiscal Year – 2022-2023 is 1.0963 , which is applied to the prior year appropriation limit of \$ 468,897 to yield an appropriation limit of \$514,052 for the Fiscal Year 2022 – 2023 ; and

**WHEREAS**, the San Simeon Community Services District plans to appropriate approximately \$96,583 in direct property tax revenue proceeds during Fiscal Year 2022 - 2023 .

**NOW, THEREFORE, BE IT RESOLVED** that the Board of Directors for the San Simeon Community Services District approves the Appropriation Limit for the District for Fiscal Year ending June 30, 2023, in the amount of \$514, 052 . This limit is greater than the expected total tax proceeds appropriation budgeted in the current fiscal year.

This Resolution shall take effect upon its adoption. **PASSED AND ADOPTED THIS** 14 day of June, 2022. Upon motion of \_\_\_\_\_, seconded by \_\_\_\_\_ and on the following roll call vote:

Chairperson Kellas:  
Vice-Chairperson Giacoletti:  
Director de la Rosa:  
Director Donahue

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Gwen Kellas  
Chairperson Board of Directors

ATTEST:

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Jeffrey Minnery,  
District Legal Counsel



**Memo**

To: San Simeon Community Services District Board of Directors  
From: Natalie F. Laacke  
CC: Charles Grace  
Date: 7/17/2018  
Re: San Simeon CSD Appropriations Limit

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This memorandum is meant to provide some additional information regarding appropriations limits and the requirements of Article XIII B of the California Constitution. I have also attached a handout to this memorandum which provides greater detail about appropriation limits.

An **appropriation** is an amount of money set aside for a certain purpose. It is not the same as spending or budget expenditures. Essentially, an *appropriation is an authorization for money to be spent* – the actual spending of the money occurs later. Proposition 4 added Article XIII B to the California Constitution which sets the limit on the amount of money which can be **appropriated** from tax revenue or “proceeds of taxes.”

The **appropriations limit** is based on a calculation of the prior year’s appropriation limit, population change, and Consumer Price Index (CPI). This calculation of the limit is not related to revenues received by the local agency.

Revenue received by the District may be more or less than the appropriations limit. Sometimes actual revenue received is the restraint, not the appropriations limit. If tax revenue from the County is less than the appropriations limit set by the District, the District will be limited in their spending by the revenue.

**Following are two appropriations limit situations:**

*Situation A*

If the District’s tax revenue from the County is more than the appropriations limit set by the District, the District would only be able to appropriate to budget line items, and later spend, up to the amount set by the appropriations limit.

*Situation B*

If the District’s tax revenue from the County is less than the appropriations limit set by the District, the District would be limited in its appropriations to budget line items by the amount of revenue received even though the appropriations limit is higher.

With regard to San Simeon, only a (small) portion of the District's revenue (\$84,617 for FY18-19) comes from San Luis Obispo County's one percent ad valorem charges (taxes based on assessed value of property). The appropriations limits required by Proposition 4 only apply to the revenue the District receives from taxes. The District receives the majority of its revenue from water/sewer utility fees. These proceeds are not governed by Proposition 4 and therefore the appropriations limits do not apply to that revenue. That is why it is not a problem that the appropriation limit for FY18-19 is 426,867, but the amount the District will spend is closer to \$800,000.

### **Additional Information**

#### *Appropriations Not Subject to Limit*

Not all appropriations are subject to the limit. For CSDs, these exceptions include:

1. Appropriations to pay for costs of complying with federal laws and court mandates
2. Payments for interest and redemption charges on pre-existing (i.e. pre-Proposition 4) or voter-approved bonded indebtedness
3. Withdrawals from previously appropriated reserve funds
4. Refunds of taxes

#### *Appropriations Permitted in Excess of Limit*

1. Emergency – Declared Emergency appropriations do not count toward limit
2. Voter Approval – Voters may authorize an increase in the appropriations limit, not to exceed four years

Dear Fiscal Officer:

**Subject: Price Factor and Population Information**

**Appropriations Limit**

California Revenue and Taxation Code section 2227 requires the Department of Finance to transmit an estimate of the percentage change in population to local governments. Each local jurisdiction must use their percentage change in population factor for January 1, 2022, in conjunction with a change in the cost of living, or price factor, to calculate their appropriations limit for fiscal year 2022-23. Attachment A provides the change in California's per capita personal income and an example for utilizing the price factor and population percentage change factor to calculate the 2022-23 appropriations limit. Attachment B provides the city and unincorporated county population percentage change. Attachment C provides the population percentage change for counties and their summed incorporated areas. The population percentage change data excludes federal and state institutionalized populations and military populations.

**Population Percent Change for Special Districts**

Some special districts must establish an annual appropriations limit. California Revenue and Taxation Code section 2228 provides additional information regarding the appropriations limit. Article XIII B, section 9(C) of the California Constitution exempts certain special districts from the appropriations limit calculation mandate. The code section and the California Constitution can be accessed at the following website: <http://leginfo.legislature.ca.gov/faces/codes.xhtml>.

Special districts required by law to calculate their appropriations limit must present the calculation as part of their annual audit. Any questions special districts have on this requirement should be directed to their county, district legal counsel, or the law itself. No state agency reviews the local appropriations limits.

**Population Certification**

The population certification program applies only to cities and counties. California Revenue and Taxation Code section 11005.6 mandates Finance to automatically certify any population estimate that exceeds the current certified population with the State Controller's Office. **Finance will certify the higher estimate to the State Controller by June 1, 2022.**

**Please Note:** The prior year's city population estimates may be revised. The per capita personal income change is based on historical data.

If you have any questions regarding this data, please contact the Demographic Research Unit at (916) 323-4086.

KEELY MARTIN BOSLER  
Director  
By:

ERIKA LI  
Chief Deputy Director

Attachment

- A. **Price Factor:** Article XIII B specifies that local jurisdictions select their cost of living factor to compute their appropriation limit by a vote of their governing body. The cost of living factor provided here is per capita personal income. If the percentage change in per capita personal income is selected, the percentage change to be used in setting the fiscal year 2022-23 appropriation limit is:

Per Capita Personal Income	
Fiscal Year (FY)	Percentage change over prior year
2022-23	7.55

- B. Following is an example using sample population change and the change in California per capita personal income as growth factors in computing a 2022-23 appropriation limit.

**2022-23:**

Per Capita Cost of Living Change = 7.55 percent  
 Population Change = -0.30 percent

Per Capita Cost of Living converted to a ratio:  $\frac{7.55 + 100}{100} = 1.0755$

Population converted to a ratio:  $\frac{-0.30 + 100}{100} = 0.997$

Calculation of factor for FY 2022-23:  $1.0755 \times 0.997 = 1.0723$

$$\frac{7.55 + 100}{100} = 1.0755$$

$$\frac{1.94 + 100}{100} = 1.0194$$

$$1.0755 \times 1.0194 = 1.0963$$

**Attachment B**  
**Annual Percent Change in Population Minus Exclusions\***  
**January 1, 2021 to January 1, 2022 and Total Population, January 1, 2022**

<b>County City</b>	<b><u>Percent Change</u></b>	<b><u>--- Population Minus Exclusions ---</u></b>		<b><u>Total Population</u></b>
	<b>2021-2022</b>	<b>1-1-21</b>	<b>1-1-22</b>	<b>1-1-2022</b>
San Luis Obispo				
Arroyo Grande	-1.29	18,533	18,294	18,294
Atascadero	-1.43	29,860	29,434	30,480
El Paso De Robles	-1.53	31,659	31,176	31,176
Grover Beach	-1.34	12,879	12,707	12,707
Morro Bay	-1.62	10,638	10,466	10,466
Pismo Beach	-1.41	8,095	7,981	7,981
San Luis Obispo	0.24	47,541	47,653	47,653
Unincorporated	1.94	116,466	118,720	121,964
County Total	0.28	275,671	276,431	280,721

\*Exclusions include residents on federal military installations and group quarters residents in state mental institutions, state and federal correctional institutions and veteran homes.

**4.F. Consent Agenda Items:  
APPROVAL OF A TRANSFER OF FUNDS FROM THE  
MONEY MARKET ACCOUNT TO THE LOCAL AGENCY  
INVESTMENT FUND (LAIF) ACCOUNT IN THE AMOUNT  
OF \$900,000.00.**



## CONSENT AGENDA ITEM STAFF REPORT

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### **ITEM 4.F. APPROVAL OF A TRANSFER OF FUNDS FROM THE MONEY MARKET ACCOUNT TO THE LOCAL AGENCY INVESTMENT FUND (LAIF) ACCOUNT IN THE AMOUNT OF \$900,000.00.**

#### Summary:

The District currently has two (2) bank accounts with Pacific Premiere Bank. A general checking account and a money market account. During budget preparation it was determined that the deposit insurance coverage amount for the money market account is \$250,000.00. This amount is well below the total amount of funds currently in the money market account with Pacific Premiere Bank.

The District currently has an open and active account with Local Area Investment Fund (LAIF). LAIF is an investment alternative for California's local governments and special districts. The enabling legislation for LAIF is Section 16429.1 et seq. of the California Government Code. This program offers local agencies the opportunity to participate in a major portfolio, which invests hundreds of millions of dollars, using the investment expertise of the State Treasurer's Office professional investment staff at no additional cost to the taxpayer. Although LAIF is not federally insured, due to the portfolio's characteristics, credit risk is minimal such that the District's funds are better protected.

This item was placed on the May 26, 2022 Special meeting agenda but was tabled due to the lack of a Board member quorum.

#### Recommendation:

- 1) The Board may choose to leave the funds in the Pacific Premiere Money Market Account.
- 2) The Board may choose to direct Staff to transfer \$900,000.00 into the District's existing LAIF account.

Enc: Handout from the State of California containing Q & A's related to LAIF

# **Frequently Asked Questions**

## **LAIF Account**

### **What entities are permitted to invest in LAIF?**

Local governmental units, nonprofit corporations whose membership is confined to public agencies or public officials, and qualified quasi-governmental agencies can invest in LAIF. (Government Code Section 16429.1)

### **Does LAIF allow multiple accounts and subaccounts for each participating agency?**

No. However, agencies are permitted to open separate bond proceeds accounts.

### **What documents are required to open a LAIF account?**

A Certified Board Resolution (adopted by the entity's governing body) and a New LAIF Account form (available online at <http://www.treasurer.ca.gov/pmia-laif/forms/new.pdf>) are required to open a regular LAIF account. In addition to these documents, a Bond Application and Official Statement are required to open a LAIF bond proceed account. Please see "How to Participate" at <http://www.treasurer.ca.gov/pmia-laif/answer/howto.asp> and contact LAIF staff at 916-653-3001 for more information.

### **What are the LAIF procedures for depositing and withdrawing funds?**

See "Procedures for LAIF Transactions" at [www.treasurer.ca.gov/pmia-laif/answer/procedures.asp](http://www.treasurer.ca.gov/pmia-laif/answer/procedures.asp).

### **How do I obtain a copy of the wiring instructions for my LAIF transactions?**

Contact LAIF staff at 916-653-3001 for the wiring instructions for your bank.

### **Are there minimum and/or maximum LAIF account balance restrictions?**

Yes. Regular LAIF account balances are capped at \$75 million. There is no minimum account balance requirement. Bond proceeds accounts have no minimum or maximum balance restrictions.

### **How many transactions are permitted each month?**

Each regular LAIF account is permitted 15 transactions per month.



### **Is there a minimum and/or maximum transaction amount for deposits and withdrawals?**

Yes. For regular LAIF accounts, the minimum transaction amount is \$5,000 and the maximum transaction amount is \$75 million. Bond proceeds accounts have a one-time deposit with no cap and are set-up with a monthly drawdown schedule.

### **Does LAIF require advance notice for deposits and/or withdrawals?**

No. However, for cash flow purposes, we request one day prior notice for deposits and withdrawals of \$10 million or more.

### **Is there a cutoff time for deposits and withdrawals?**

Yes. LAIF transactions completed by 10:00 a.m. Monday – Friday will receive same day credit. Also, transactions may be requested 10 calendar days in advance of the effective date.

### **Can a LAIF account remain open with a zero balance?**

Yes. Regular LAIF accounts will remain open with a zero balance unless a request is made to close the account. Bond proceed accounts will automatically be closed when the balance is zero.

### **Are confirmation numbers provided for each transaction?**

Yes. Confirmation numbers are given at the time of the transaction and are also included in the monthly statements.

### **How do I request changes to my LAIF account?**

Address, authorization and banking information change forms are available online at [www.treasurer.ca.gov/pmia-laif/laif.asp](http://www.treasurer.ca.gov/pmia-laif/laif.asp) under “Forms.” Change forms must be signed by two (2) persons authorized by the agency’s resolution and then returned to LAIF. A sample resolution is also available if the authorized signers change. Please contact LAIF staff at 916-653-3001 for further assistance.

### **How do I request a copy of a statement?**

Monthly statements are available online for one year under “Reporting Documents” at [www.treasurer.ca.gov/pmia-laif/laif.asp](http://www.treasurer.ca.gov/pmia-laif/laif.asp). For requests beyond one year, please contact LAIF staff at 916-653-3001 for assistance.

## Are LAIF funds borrowable?

No. "Moneys placed with the Treasurer for deposit in the Local Agency Investment Fund by cities, counties, special districts, nonprofit corporations, or qualified quasi-governmental agencies shall not be subject to either of the following:

- a) Transfer or loan pursuant to Sections 16310, 16312, or 16313.
- b) Impoundment or seizure by any state official or state agency."  
(Government Code Section 16429.3)

## Will LAIF funds still be available if there is a State budget impasse?

Yes. The Court of Appeal issued a decision on the Jarvis Taxpayers Association v. Connell case on May 29, 2002 where the court held that the Controller may disburse funds during a budget impasse when the state and federal law properly authorizes or requires their payment, despite the absence of a budget act or emergency appropriation. "The right of a city, county, city and county, special district, nonprofit corporation, or quasi-governmental agency to withdraw its deposited moneys from the Local Agency Investment Fund, upon demand, may not be altered, impaired, or denied, in any way, by any state official or state agency based upon the state's failure to adopt a State Budget by July 1 of each new fiscal year." (Government Code section 16429.4)

## Is LAIF Considered a 2a7?

No. As a part of the Pooled Money Investment Account (PMIA), LAIF does not exist on its own, it is a subset of the PMIA. Due to this comingling of funds LAIF is not a 2a7 External Investment Pool (nor is the PMIA/LAIF "2a7 like") and as such exempt from Government Accounting Standards Board (GASB) Rule 72.

## Administration

### How much are LAIF's administrative costs?

Administrative costs are not to exceed 5% of quarterly earnings of the fund. However, if the 13-week Daily Treasury Bill Rate on the last day of the fiscal year is below 1%, then administrative costs shall not exceed 8% of quarterly earnings of the fund for the subsequent fiscal year. (Government Code Section 16429.1) These fees cover actual costs to administer the LAIF program. A history of administrative costs can be found at [www.treasurer.ca.gov/pmia-laif/historical/admin\\_costs.asp](http://www.treasurer.ca.gov/pmia-laif/historical/admin_costs.asp).

### How often are administrative fees assessed and how are they paid?

Administrative fees are assessed quarterly. For each LAIF account, these fees are deducted from quarterly earnings prior to interest posting.

## **Are there additional fees for wiring funds?**

No. LAIF does not charge a fee for wires or book transfers. However, your financial institution may charge a fee for LAIF transfers.

## **Interest**

### **What's the current interest rate on the Pool?**

For current interest rates on the Pool, go to [http://www.treasurer.ca.gov/pmia-laif/performance/PMIA-LAIF\\_perform.pdf](http://www.treasurer.ca.gov/pmia-laif/performance/PMIA-LAIF_perform.pdf)

### **What methodology is used to calculate interest (simple maturity, yield to maturity, etc.)?**

Interest is calculated on a dollar-day basis to guarantee equitable distribution among all member funds.

### **How frequently is interest paid?**

Interest is paid quarterly and is posted to the LAIF accounts on the 15th of the month, or previous business day if the 15th is a non-working day, after the quarter end (i.e., January 15, April 15, July 15 and October 15).

### **How are gains and/or losses reported (factored monthly or only when realized)?**

Gains and/or losses are reported when realized.

## **Reporting**

### **How often is the portfolio yield reported to participants?**

The portfolio yield is updated weekly. See "PMIA/LAIF Performance" at [http://www.treasurer.ca.gov/pmia-laif/performance/pmia-laif\\_perform.pdf](http://www.treasurer.ca.gov/pmia-laif/performance/pmia-laif_perform.pdf). To receive weekly electronic performance updates, please contact LAIF staff at 916-653-3001 to be added to the subscriber list.

### **Are administrative fees of the Pool deducted before quoting the yield?**

No. The yield is quoted prior to deduction of administrative fees.

## **Where can I find reporting documents for the Pool?**

The following reports can be found at <http://www.treasurer.ca.gov/pmia-laif/pmia/index.asp> under “Reporting Documents”: Disclosure Statements, Market Valuation, Maturity Schedule, Monthly Reports, Quarterly Reports, Annual Reports, and Independent Auditor’s Report by Bureau of State Audits.

## **Is the Pool insured?**

No. However, due to the portfolio’s characteristics, credit risk is minimal.

## **Securities**

### **Does the Pool provide a written statement of the PMIA Investment Policy?**

Yes. A written statement of the PMIA Investment Policy can be found at [www.treasurer.ca.gov/pmia-laif/answer/policy.pdf](http://www.treasurer.ca.gov/pmia-laif/answer/policy.pdf). The policy includes a description of authorized securities, credit standards of investments, allowable maturity range of investments, the maximum allowable dollar weighted average portfolio maturity, the limits of portfolio concentration permitted for each type of security, and the policy on reverse repos.

## **Is the Pool rated?**

No. The Pool is not rated.

## **Security**

### **What are the safekeeping practices of the Pool?**

The Treasurer may place and maintain for safekeeping as a trust deposit with any qualified trust company, other than the depositor bank, or with the Federal Reserve Bank or any branch thereof any securities that have been received by the Treasurer. (Government Code Section 16551) The Treasurer utilizes a custodian bank.

## **Is the Pool subject to audit by an independent auditor?**

Yes. The Pool is audited annually by the Bureau of State Audits and the resulting report is posted to the website at [www.treasurer.ca.gov/pmia-laif/reports/bsa.pdf](http://www.treasurer.ca.gov/pmia-laif/reports/bsa.pdf).

## **Who makes the portfolio decisions?**

Investment decisions are made by the State Treasurer and the Investment Division staff of the State Treasurer's Office.

## **How do the investment managers monitor the credit risk of the securities in the Pool?**

A written statement of portfolio management goals, objectives and policies, along with independent market valuations, are used to monitor the credit risk of the securities in the Pool.

## **How is the Pool monitored?**

The Pool is monitored by the Pooled Money Investment Board, Local Investment Advisory Board and the Bureau of State Audits to ensure compliance with written policies.

## **How often are the portfolio's market and securities value reported?**

These values are reported quarterly and can be found at [www.treasurer.ca.gov/pmia-laif/reports/quarterly.asp](http://www.treasurer.ca.gov/pmia-laif/reports/quarterly.asp).

## **What method is used to value the portfolio?**

The amortized cost and current value methods are used to value the portfolio.

## **Does the pool distribute detailed reports of its holdings?**

Yes. These reports are distributed on a monthly basis and can be found at [www.treasurer.ca.gov/pmia-laif/reports/monthly.asp](http://www.treasurer.ca.gov/pmia-laif/reports/monthly.asp).

**4.G. Consent Agenda Items:  
APPROVAL OF JEFF OLIVERIA TO BE A VOTING  
MEMBER OF THE WATER RESOURCES ADVISORY  
COMMITTEE (WRAC) ON BEHALF OF THE SAN SIMEON  
CSD.**



## **CONSENT AGENDA ITEM STAFF REPORT**

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### **ITEM 4.G. APPROVAL OF JEFF OLIVEIRA (OLIVEIRA ENVIRONMENTAL CONSULTING) TO BE A VOTING MEMBER OF THE WATER RESOURCES ADVISORY COMMITTEE (WRAC) ON BEHALF OF THE SAN SIMEON CSD.**

#### Summary:

Currently the SSCSD General Manager is the only voting member for SSCSD at the County Water Resource Advisory Committee. This arrangement arose out of the lack of participation by previous Board members that nonetheless wanted to continue grant finding efforts.

#### Recommendation:

Given that voting at the WRAC meetings requires the voting member to be physically present at the WRAC meetings it is recommended that Oliveira Consulting (whose office is local to San Luis Obispo) is approved by the Board to be the WRAC voting member.

**4.H. Consent Agenda Items:**

**APPROVAL FOR STAFF TO WORK WITH THE LOCAL  
AREA FORMATION COMMISSION (LAFCO) ON  
MATTERS RELATED TO THE HORSE TROUGH  
CONSUMPTION.**





## CONSENT AGENDA ITEM STAFF REPORT

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### ITEM 4.H. APPROVAL FOR STAFF TO WORK WITH THE LOCAL AREA FORMATION COMMISSION (LAFCO) ON MATTERS RELATED TO THE HORSE TROUGH CONSUMPTION.

#### Summary:

Adjacent to the District well fields there is private property that contains a horse watering trough. The horse trough water is provided by SSCSD Well 2. Based on research, observation, and historical knowledge, Staff believes that the trough has been used in its current capacity for over twenty (20) years.

In addition to the trough being used by the property owner, GES staff has observed that local wildlife also consumes water from the trough. The trough has become part of the ecosystem and provides drinking water for turkeys, deer, mountain lions, and bobcats, to name a few. Removing the trough will be disruptive to local wildlife.

The current usage fluctuates based on the number of horses being kept in the area. Staff calculates annual consumption to be approximately three (3) – ten (10) units. Over the previous twelve (12) months usage on the meter reflects that five (5) units of water (3,740 gallons) has been consumed

#### Discussion:

A concerned citizen has emailed a formal complaint to the Board stating that the trough constitutes a gift of funds. His complaint is included with the Board packet. Given the existing and long-term service provided, the District needs work with the property owner and due to the location of the trough being potentially outside the District boundary, the District will need to work with LAFCO on this matter.

#### Recommendation:

The Chairperson is recommending that staff be authorized to work directly with LAFCO and the property owner to formally resolve this matter. Staff is recommending a water resource consultant is utilized to coordinate with the property owner and LAFCO.

Enc: Complaint from Henry Krzciuk dated May 25, 2022

May 25, 2022

To: San Simeon CSD Directors

Cc: District Counsel and General Manager

Subject: Unlawful gifting of San Simeon CSD Water and withholding of associated records in violation of the Public Records Act.

Please consider this a formal complaint. Multiple years of unlawful gifting of district water outside of district boundaries was discovered via a Public Records Act (PRA) request for documentation of the district's operations related water usage. The Public Records Act was unlawfully used to coverup, via redaction, records of the water being gifted to an undisclosed party.

Per board member comments at the May board meeting, the amount of water involved may be relatively small (note: usage records were redacted.) One or more horse troughs may be in use. The best guess on the location of the horse trough(s) is that it is downhill from the district's reservoir. This would likely be a cattle and zebra watering trough.

Following are specifics related to the horse/cattle/zebra trough(s) violations:

1. Unlawful use of Government Code §6254.16 to deny release of information – party not district customer.

Attached is the PRA request response provided by the district in which Government Code §6254.16 was used to redact water usage because the party was a district "customer." During the May 10, 2022, board meeting, the board chair and general manager effectively hid behind this same section of government code refusing to provide any information on the gifting of this water or identify the party involved.

In response to a separate PRA request, the district indicated that no agreement could be found for distribution of district water to this undisclosed party and no evidence of funds being collected for this water. This means the party does not have an account with the district for water services.

Further, the records of water distribution to this party were provided as part of reports for the district's internal/operational use of water, not that of a customer. A review was done of the 1972 Hearst Corporation Reservoir Easement Agreement and Deed (see attached) to find any mention of district water being made available for Hearst Corp. use. No use of district water for horses or cattle or any other use is mentioned.

Government Code § 6254.16 allowing withholding of "customer" information is just that. It is a section of Government Code that applies to "customers". The district was unable or unwilling to provide any evidence that this party was a legally authorized customer of the district. Attached is a copy of Government Code § 6254.16.

Further as detailed in the next item, at this time, the district cannot have a “customer” outside of its boundaries.

Public Records Act § 6254.16 was used unlawfully to withhold public information.

## 2. Services provided outside of district boundaries without legal authority

Community services districts are prohibited from providing services outside of their district boundaries without the proper agencies approval per Government Code § 56133 *“(a) A city or district may provide new or extended services by contract or agreement outside its jurisdictional boundary only if it first requests and receives written approval from the commission of the county in which the affected territory is located.”*

Under the Public Records Act, the district has failed to provide documentation of written approval by the appropriate commission of the county. Attached for reference is a copy of this section of government code.

The district is unlawfully distributing water outside of its boundaries.

## 3. Unauthorized and unlawful gifting/use of public services

It appears this horse/cattle/zebra water usage is metered because the amount of usage was redacted on three years of records. The district’s official rate structure states that each customer will be billed for a meter charge plus usage. This party appears to be receiving a gift of district water, that is, with no meter charge or water usage charge. Further, there is no record of an in-kind or equivalent agreement approved by the district.

This is unauthorized, unlawful gifting/use of public services.

## Summary and Corrective Actions

Because of the redaction of records, the amount of water usage involved cannot be determined with certainty. Metering is undisclosed.

Timely legal and administrative cleanup of this matter is necessary.

In conformance with the PRA for non-customer records, the party involved, location of service(s), and unredacted water usage records must be immediately released to me per my original PRA request and made public. This party is currently not a legal customer of the district.

The general manager must bring this matter openly (not in closed session) before the board and public. Again, this is not a legal customer.

If this use is to continue, proper authorization needs to be obtained including a resolution/ordinance to authorize use of public services being water with appropriate charges and/or equivalent value services.

San Luis Obispo County Local Agency Formation Commission will need to be approached for approval of an Outside User Agreement.

Please acknowledge receipt of my letter.

I look forward to the district's timely and open cleanup/resolution of this unlawful gifting of San Simeon CSD water and withholding of associated records in violation of the Public Records Act.

Sincerely,

A handwritten signature in black ink, appearing to read "Hank Krzciuk". The signature is written in a cursive, flowing style.

Hank Krzciuk  
San Simeon Resident

**4.I. Consent Agenda Items:**

**APPROVAL FOR STAFF TO DRAFT A WATER WILL  
SERVE LETTER AND BEGIN REVISIONS TO DISTRICT  
ORDINANCE NO. 102.**



## **CONSENT AGENDA ITEM STAFF REPORT**

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### **ITEM 4.I. APPROVAL FOR STAFF TO DRAFT A WATER WILL SERVE LETTER AND BEGIN REVISIONS TO DISTRICT ORDINANCE NO. 102.**

#### Summary:

During the October 2020 Board meeting, Grace Environmental Services (GES) staff provided a list of eleven (11) items related to removing the existing water moratorium. Many of these tasks have been completed. Significant progress has been made completing six (6) of eleven (11) tasks. In furtherance of task nine (9). Attached is a draft will serve letter for the Board's review and direction to staff.

Also enclosed is a recently submitted hardship request from a property owner that is currently on the waitlist. Per Ordinance No.102, property owners can request a public hearing occur related to their hardship application. If the Board authorizes Staff to begin finalizing a draft will serve letter, the Board can (over the next 60 days) authorize issuance of these letters to persons on the water wait list. If the Board fails to take action, a public hearing will need to be scheduled.

Enc: Draft Will Serve Letter

Enc: Request from property owner Lloyd Marcum

## San Simeon Community Services District



111 Pico Avenue, San Simeon, California 93452  
(805) 927-4778 Fax (805) 927-0399

<insert date>

<insert address>

XXXXXX, XXXXXX  
XXXXXX XX XXXXX

**Subject: “Will Serve” Letter for Potable Water Service to <insert property owner name & apn>**

Dear XXXXXX:

In response to your request, this letter will serve as confirmation that the San Simeon Community Services District (SSCSD) has sufficient potable water supply to serve the proposed XXXX project described on the SSCSD “wait list” located at <insert address> <insert APN> within the San Simeon Community Services District, San Simeon California.

The project as described above and on the wait list will use <insert acre feet of water> per year based on the <insert EDUs> on the wait list for which a deposit is being held.

If the anticipated number of EDUs necessary and or the project changes, this letter is void and a new “Will Serve” letter must be issued. This will serve is conditioned upon:

1. Negative impact to Pico Creek as determined by the Instream flow management plan
2. Payment of all current connection fees

Sincerely;

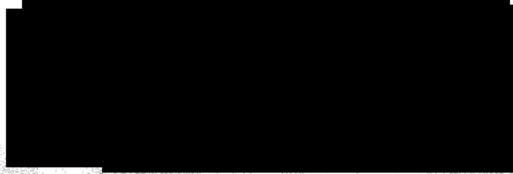
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San Simeon CSD  
General Manager

cc: XXXXX XXXX San Simeon CSD, Chairperson  
XXXXX XXXX, San Simeon CSD, District Counsel

*Lloyd Marcum D.D.S. Inc.*

*Practice Limited to Endodontics*



San Simeon Community Services District  
111 Pico Avenue  
San Simeon, CA 93452

May 22, 2022

Re: Avonne Avenue San Simeon, CA 93452 APN: 013-071-016

Dear Sirs,

Recent changes in the allocation of Will Serve letters for the San Simeon CSD have prompted this letter to you. It apparently has been established that there is sufficient water for all of the applicants on the water service wait list. I am told by Charlie Grace that I am number 12.

Please let this letter serve as an application for service under the "Hardship Application" of section V of ordinance 102:

Considerations under this section include: (1) nature and extent of financial hardship, (2) extent of proposed usage of water, (3) existence of suspected environmental problems within the vicinity of the applicant, (4) amount of removal of vegetation, (5) amount of traffic to be generated, (6) the general magnitude of potential adverse environmental impacts, (7) potential storm water generation (8) whether the subject property has the potential for re-zoning, and (9) such other factor as may be significant relative to the individual property and circumstances. I will address each of these individually for consideration.

1. The nature and extent of the financial hardship is extensive to me, my retirement and my family. The monetary detriment to the property with no water is obvious. I purchased this property with the intent of finding a place to retire with a small Mixed Use development that I would be able to manage and eventually pass down on my death to my heirs. Being unable to develop this property for which it is zoned and intended affects my family in perpetuity. Being unable to fulfill my retirement dreams is a psychological hardship.
2. Based on this and similar projects the water usage should be about 1.4 Acre Feet per year.
3. My plan has been verbally presented to the county without objections. Formal plans will be drawn soon. There are no known environmental problems at this property or the adjacent properties that I am aware of. My undergraduate degree from USC is in Marine Biology. I wrote environmental reports and studies for the marine center. I doubt there will be any concerns.



4. I have maintained the property as required by removing growth for fire concerns. Some native grasses will need to be removed, and there are no indigenous trees on the property. My plans will include copious landscaping with species concurrent with the location of the project and the community.

5. Traffic will be reviewed by the county prior to construction, but I have removed the unsightly traffic that was finding a home on my property and becoming a blight on the community. We need more housing and with this comes some burden to the local traffic.

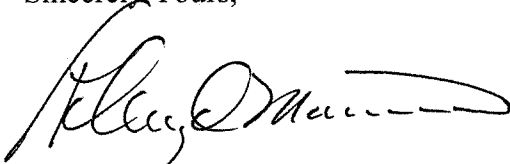
6. The property is being developed for the zoning as it was intended. Once a favorable response to this submission is granted by the CSD, formal plans will be submitted to the county for environmental review.

7. Storm water will be contained per county regulation and should be able to be contained entirely on site or as required.

8. No re-zoning should be necessary for this site.

Thank you in advance for considering this hardship application. Please enter this letter into the record for future reference and review. I give my permission to make this letter public and/or disclose and read it in open session of the CSD.

Sincerely Yours,

A handwritten signature in black ink, appearing to read "Lloyd Marcum", with a long horizontal flourish extending to the right.

Lloyd Marcum DDS  
Practice Limited to Endodontics

c: File

## **5.A. Public Hearing Item**



## **PUBLIC HEARING ITEM STAFF REPORT**

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### **ITEM 5.A. CONSIDERATION OF ADOPTION OF RESOLUTION 22-451 APPROVING THE FISCAL YEAR BUDGET FOR 2022/2023.**

#### Summary:

The purpose of the May 26, 2022 Special meeting was to introduce the draft 2022-2023 Fiscal Year budget to the Board and members of the public for feedback. During the meeting no feedback was provided.

The Board needs to adopt an operating budget on or before July 1, 2022.

#### Recommendation:

It is recommended that the Board may choose to adopt Resolution 22-451 approving the fiscal year budget 2022/2023.

Enc: Draft Fiscal Year 2022/2023 Budget  
Resolution 22-451 Approving the Fiscal Year 2022-2023 Budget

## RESOLUTION NO. 22-451

### A RESOLUTION OF THE BOARD OF DIRECTORS FOR THE SAN SIMEON COMMUNITY SERVICES DISTRICT ADOPTING THE 2022-2023 FISCAL BUDGET

**WHEREAS**, the District is required, pursuant to Government Code Section 61110, to designate a Fiscal Budget for its expenditures and revenues; and

**WHEREAS**, the Fiscal Budget must conform to generally accepted accounting and budgeting procedures for special districts; and

**WHEREAS**, the District desires to make known its planned activities and associated costs for the 2022-2023 fiscal year; and

**WHEREAS**, the District held a noticed, public meeting on June 14, 2022 to present and receive public comment on the proposed Fiscal Budget and has duly considered all public comment.

**NOW, THEREFORE, BE IT RESOLVED, DETERMINED, AND ORDERED** by the Board of Directors, San Simeon Community Services District, San Luis Obispo County, California, as follows:

1. That the proposed 2022-2023 Fiscal Budget for San Simeon Community Services District, attached hereto as Exhibit "A," be adopted.
2. That the adopted Fiscal Budget be administered as established by the District's policies and procedures.

Upon motion of Chairperson \_\_\_\_\_, seconded by Director \_\_\_\_\_ and on the following roll call vote to wit:

Chairperson Kellas:  
Vice-Chairperson Giacoletti:  
Director de la Rosa:  
Director Donahue:

The foregoing Resolution is hereby adopted this 14<sup>th</sup> day of June, 2022.

\_\_\_\_\_  
Gwen Kellas  
Chairperson of the Board of Directors

ATTEST:

\_\_\_\_\_  
Jeffrey Minnery  
District Legal Counsel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	San Simeon Community Services District													
2	Preliminary Budget ver.4													
3	Fiscal Year Ending June 30 2023													
4														
5	5/8/2022 @ 12:25				(CPI = ID CUURS49ASAO, CUUSS49ASAO	Sanatation	Water	General	Total					
6					All Item Los Angles-Long Beach-Anaheim, CA	Fund	Fund	Fund	Budget					
7	<b>Ordinary Expenses CPI 1982-84=100</b>					<b>3.80%</b>	<b>3.80%</b>	<b>3.80%</b>						
8	<b>Income</b>					<b>Rate Increase = CPI + 3%</b>	<b>6.80%</b>	<b>6.80%</b>	<b>6.80%</b>					
9		4000			<b>Operating Revenues</b>									
10		4005			Utility fees-waste	\$485,940	\$ -	0	\$485,940					
11		4010			Utility fees-water	0	\$448,560	0	\$448,560					
12		4025			Service fees	0	0	\$103,596	\$103,596					
13		4050			State of Calif utility fees-waste	\$68,034	0	0	\$68,034					
14						0	0	0	0					
15						0	\$ -	0	0					
16					<b>Total Operating Revenue</b>	<b>\$553,974</b>	<b>\$448,560</b>	<b>\$103,596</b>	<b>\$1,106,130</b>					
17														
18		4100			<b>Property Taxes</b>									
19		4101			4110 Prop Tax current secured	0	0	\$96,583	\$96,583					
20		4120			4120 Prop Tax current secured supp	0	0	0	0					
21		4130			4130 Prop Tax current unsecured	0	0	0	0					
22		4140			4140 Prop Tax current unsecured supp	0	0	0	0					
23		4150			4150 Prop Tax prior secured	0	0	0	0					
24		4160			4160 Prop Tax prior secured supp	0	0	0	0					
25		4170			4170 Prop Tax prior unsecured	0	0	0	0					
26		4180			4180 Prop Tax prior unsecured supp	0	0	0	0					
27		4190			4190 Penalties and interest prop tax	0	0	0	0					
28		4220			4220 Homeowners prop tax relief	0	0	0	0					
29		4230			4230 Prop tax admin fee SB 2557	0	0	0	0					
30		4270			4270 Current utility tax	0	0	0	0					
31		4280			4280 State aid-homeowners	0	0	0	0					
32						0	0	0	0					
33						0	0	0	0					
34						0	0	0	0					
35					<b>Total Property Taxes</b>	<b>0</b>	<b>0</b>	<b>\$96,583</b>	<b>\$96,583</b>					
36					<b>Other Income</b>									
37		4750			Fema-storm damage funds	0	0	0	0					
38		4800			Miscellaneous Income	0	0	0	0					
39		4900			Late fees & adjustments	0	0	0	0					
40						0	0	0	0					
41						0	0	0	0					
42						0	0	0	0					
43					<b>Total Income</b>	<b>\$553,974</b>	<b>\$448,560</b>	<b>\$200,179</b>	<b>\$1,202,713</b>					
44														
45														
46					<b>Expense</b>									
47		6000			Accounting	\$3,292	\$3,292	\$3,291	\$9,875					
48		6015			Auto Expenses	0	\$ -	0	\$0					
49		6017			Bad Debts	0	\$ -	0	\$0					
50		6020			Bank Fees	0	\$0	\$500	\$500					
51		6025			Bookkeeping	\$6,000	\$6,000	\$6,000	\$18,000					
52		6030			Director Fees	\$3,000	\$3,000	\$3,000	\$9,000					
53		6031			Payroll Expense	\$200	\$200	\$200	\$600					
54		6035			Dues and Subscriptions	\$0	\$0	\$6,100	\$6,100					
55		6045			Electrical Power	\$28,878	\$23,826	\$5,856	\$58,560					
56		6050			Election Expenses	0	\$ -	\$1,000	\$1,000					
57		6055			Road Maintenance	0	\$ -	\$0	\$0					
58		6060			RipRap Engineering	\$5,000	\$ -	\$0	\$5,000					
59		6065			Equipment Rental	0	\$ -	\$0	\$0					
60		6075			Insurance-PERS Health	\$2,500	\$2,500	\$0	\$5,000					
61		6076			Pension Plan - PERS Retirement	\$8,340	\$8,340	\$0	\$16,680					
62		6080			Insurance - Liability	\$4,952	\$6,109	\$1,238	\$12,299					
63		6095			LAFCO Costs Apportionment	\$0	\$0	\$5,000	\$5,000					
64		6100			Legal Fees	\$25,000	\$62,836	\$15,000	\$102,836					
65		6105			Licenses and permits	\$16,452	\$4,096	\$316	\$20,864					
66		6110			Memberships and seminars	\$0	\$ -	\$0	\$0					
67		6115			Miscellaneous expenses	\$0	\$0	\$1,500	\$1,500					
68		6120			Office Expenses	\$0	\$0	\$1,000	\$1,000					
69		6125			O & M operatons	\$323,398	\$236,159	\$64,680	\$624,237					
70		6130			Operating Repairs & Supplies	\$20,000	\$15,000	\$5,000	\$40,000					
71		6135			Weed Abatement	0	\$ -	\$2,294	\$2,294					
72		6145			Professional Fees	\$30,000	\$42,500	\$15,000	\$87,500					
73		6150			Contingency	\$0	\$ -	\$0	\$0					
74		6180			Street lights	\$0	\$ -	\$7,440	\$7,440					
75		6191			Emergency Water Standby	\$0	\$15,570	\$0	\$15,570					
76		6192			Excess Repairs	\$15,000	\$27,767	\$0	\$42,767					
77					Unreimbursed Utilities	\$7,222	\$5,778	\$1,445	\$14,445					
78		6195			Website Support	\$5,027	\$5,027	\$5,026	\$15,081					
79					<b>Total Expense</b>	<b>\$504,261</b>	<b>\$468,000</b>	<b>\$150,886</b>	<b>\$1,123,147</b>					
80														
81					<b>Net Operating Income(Loss)</b>	<b>\$49,713</b>	<b>-\$19,440</b>	<b>\$49,293</b>	<b>\$79,566</b>					
82														
83					<b>Other Income/Expenses</b>									
84					<b>Other Income</b>									
85		8010			Interest Income	\$0	\$0	\$430	\$430					
86		8030			Interest - LAIF	\$0	\$0	\$0	\$0					
87					Grant Funds	\$0	\$0	\$0	\$0					
88					Trash Franchise Rebate	\$0	\$0	\$5,000	\$5,000					
89						0	0	0	0					
90					<b>Total Other Income</b>	<b>\$0</b>	<b>\$0</b>	<b>\$5,430</b>	<b>\$5,430</b>					
91														
92					<b>Other Expenses</b>									
93		9010			Depreciation Expense	\$43,406	\$42,744	\$7,342	\$93,492					
94		9030			Capital Projects/Improvements	\$0	\$0	\$0	\$0					
95					Water Well Loan Interest	\$0	\$11,641	\$0	\$11,641					
96					Water Well Loan Repayment	\$0	\$9,049	\$0	\$9,049					
97					Future Capital Project Funding	\$0	\$0	\$40,000	\$40,000					
98						\$0	\$0	\$0	\$0					
99						\$0	\$0	\$0	\$0					
100					<b>Total Other Expenses</b>	<b>\$43,406</b>	<b>\$63,434</b>	<b>\$47,342</b>	<b>\$154,182</b>					
101														
102					<b>Net Other Income (Loss)</b>	<b>-\$43,406</b>	<b>-\$63,434</b>	<b>-\$41,912</b>	<b>-\$148,752</b>					
103														
104					<b>Net Income (Loss)</b>	<b>\$6,307</b>	<b>-\$82,874</b>	<b>\$7,381</b>	<b>-\$69,186</b>					
105														

**DRAFT**

May 15, 2022 @ 19:03 hrs					DRAFT
<b>San Simeon Community Services District Rate Structure (Proforma)</b>					
<b>Fiscal Year 2022-23</b>					
5/12/22 @ 1525hrs					
<b>Fiscal Year</b>		<b>21-22</b>	<b>22-23</b>	<b>\$ Increase</b>	
Ordinance		#121	#121	% Increase	
Ordinance Adopted		Aug. 14, 2019	Aug. 14, 2019		
Ordinance Effective					
<b><u>Service Charges</u></b>					
Proposed Increase		4.60%	6.80%		
Per month - Per Service		\$39.78	\$42.48	\$2.70	
% Increase		4.60%	6.80%	6.8%	
<b><u>Water Rates</u></b>					
Proposed Increase		4.60%	6.80%		
Per 100 cf of water used		\$14.21	\$15.18	\$0.97	
% Increase		4.60%	6.80%	6.8%	
<b><u>Irrigation Meters</u></b>					
Per 100 cf of water used		\$23.81	\$25.43	\$1.62	
% Increase		4.60%	6.80%	6.8%	
<b><u>Recycled Water</u></b>					
Proposed Increase					
per gal					
% Increase					
<b><u>Sewer Rates</u></b>					
Proposed Increase		4.60%	6.80%		
Per 100 cf of water used					
<b><u>Motels</u></b>					
		\$17.37	\$18.55	\$1.18	
% Increase		4.60%	6.80%	6.8%	
<b><u>Residences</u></b>					
		\$10.69	\$11.42	\$0.73	
% Increase		4.60%	6.80%	6.8%	
<b><u>Restaurants</u></b>					
		\$26.89	\$28.72	\$1.83	
% Increase		4.60%	6.80%	6.8%	
<b><u>Commercial</u></b>					
		\$10.69	\$11.42	\$0.73	
% Increase		4.60%	6.80%	6.8%	

**DRAFT**

San Simeon Community Services District

ACCOUNT ALLOCATIONS

Effective July 1, 2022

Agenda Item: \_\_\_\_\_  
Date: \_\_\_\_\_  
Action: **DRAFT**

5/12/22 @19:10 hrs

		Sanitation	Water	Genera
		Fund	Fund	Fund
<b>Income</b>				
4000	<b>Operating Revenues</b>			
4005	Utility fees-waste	X		
4010	Utility fees-water		X	
4025	Service fees			X
4050	State of Calif utility fees-waste	X		
	Total Operating Revenue			
4100	<b>Property Taxes</b>			
4101	4110 Prop Tax current secured			X
4120	4120 Prop Tax current secured supp			X
4130	4130 Prop Tax current unsecured			X
4140	4140 Prop Tax current unsecured supp			X
4150	4150 Prop Tax prior secured			X
4160	4160 Prop Tax prior secured supp			X
4170	4170 Prop Tax prior unsecured			X
4180	4180 Prop Tax prior unsecured supp			X
4190	4190 Penalties and interest prop tax			X
4220	4220 Homeowners prop tax relief			X
4230	4230 Prop tax admin fee SB 2557			X
4270	4270 Current utility tax			X
4280	4280 State aid-homeowners			X
	Total Property Taxes			X
	<b>Other Income</b>			
4750	Fema-storm damage funds	X	X	X
4800	Miscellaneous Income	X	X	X
4900	Late fees & adjustments	X	X	X
	Total Income			
	<b>Expenses</b>			
6000	Accounting	33%	33%	33%
6015	Auto Expenses			
6017	Bad Debts	X	X	X
6020	Bank Fees			X
6025	Bookkeeping	33%	33%	33%
6030	Director Fees	33%	33%	33%
6031	Payroll Expense	33%	33%	33%
6035	Dues and Subscriptions			100%
6045	Electrical Power up to \$66K Total (sub frm Op Mang)	X	X	X
6050	Election Expenses			X
6055	Road Maintence			X
6060	RipRap Engineering	X		
6065	Equipment Rental	X	X	X
6075	Insurance-PERS Health			X
6076	Pension Plan - PERS Retirement	50%	50%	
6080	Insurance - Liability	50%	50%	
6095	LAFCO Costs Apportionment			100%
6100	Legal Fees	X-33%	X-33%	X-33%
6105	Licenses and permits	X	X	X
6110	Memberships and seminars		<b>Dues &amp; Subs</b>	
6115	Miscellaneous expenses	X	X	X
6120	Office Expenses			X
6125	Operations Management	50%	40%	10%
6130	Prevent/Maint Repair/Supplies -\$2,500 to \$40K max	X	X	X
6135	Weed Abatement			X
6145	Professional Fees	X	X	X
6150	Contingency	X	X	X
6180	Street lights			X
6191	Emergency Water Standby/RO		X	
6192	Excess Repairs/Capital +\$2,500 w/apprl	X	X	X
	Excess PG&E Utilities	<b>a</b>	<b>Proportaionate to PGE actg</b>	
6195	Website Support	33%	33%	33%
	Total Expense			
	<b>Net Operating Income(Loss)</b>			
	<b>Other Income/Expenses</b>			
June 14, 2022 Board Meeting Packet				
	<b>Other Income</b>			
8010	Interest Income			X

**DRAFT**

**SAN SIMEON COMMUNITY SERVICES DISTRICT**  
**Capital Improvement Projects**  
**FY 2022-2023**

**Wastewater Treatment Plant**

- **Ocean Outfall Repair** **\$120,000**  
 This is the repair of the outfall line as determined previous inspections involving the loss of support.
  
  - **WWTP Composite Samplers** **\$12,000**  
 These are needed for testing and reporting purposes and we need two at approx. \$6,000 ea.
  
  - **Pipe Bridge Design** **\$37,500**  
 This is a joint project with the Water Fund for design of a new bridge to support the water & sewer line over Padre de Juan creek.
- Sub Total - \$169,500**

**Water Storage and Distribution**

- **Pipe Bridge Design** **\$37,500**  
 This is a joint project with the Sewer Fund for design of a new bridge to support the water & sewer line over Padre de Juan creek.
  
  - **Disposal of Transite Pipe** **\$15,000**  
 This was extra replacement pipe that will no longer be used, might be class as hazardous material for disposal.
  
  - **Paint Elevated Wall on Reservoir** **\$10,000**  
 This major repair may be expensed but is listed here for Review.
  
  - **Tank Reservoir Easement** **\$60,000**  
 This project will complete the easement acquisition, design for the water storage, bid package and project management.
  
  - **Residential Meter Replacement** **\$90,000**  
 This project is necessary to replace the residential meter.
- Sub Total - \$212,500**



**Capital Improvement Projects  
Continued  
FY 2022-2023**

**General Fund**

• <b>Pico Stair Repair</b>	\$30,000
This project is to further stabilize the stairway at Pico Beach access. (Included in future Projects Gen on 22-23 Budget)	
• <b>Accounting Software Package</b>	\$25,000
This bookkeeping software is necessary to complete the transition to complete enterprise fund accounting	
	<u>Sub Total - \$25,000</u>
<b>Total Project Cost FY 2022-23</b>	<u>\$407,000</u>

## **6.A. Business Action Item**



## **BUSINESS ACTION ITEM STAFF REPORT**

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### **ITEM 6.A. BOARD DISCUSSION, CONSIDERATION AND APPROVAL OF PROPOSALS RELATED TO GRANT WRITING SERVICES FOR THE PERIOD OF THREE YEARS.**

#### Summary

Both Chairperson Kellas and Director Donahue have suggested the importance of the District obtaining an on-call grant writer to help the District obtain funding related to various capital improvement projects such as the pipe-bridge. On April 4, 2022 GES Staff mailed a request for proposal related to grant writing services to twenty-seven (27) companies.

The District received two responsive proposals from the following firms:

- 1) Littleberry Press / GrantSelect
- 2) The CrisCom Company

The purchasing states the following:

#### **E. Professional Consultant Services**

##### **1. Definition and Restrictions**

Professional consultant services are of a technical nature and, due to the type of services to be provided, do not readily fall within the "low bid" competitive bidding process. California Government Code Section 4525 *et. seq.* requires that selection of professional consultants in the categories of architects, landscape architects, engineers, surveyors, and environmental consulting be made on the basis of demonstrated competence and the professional qualifications necessary for the satisfactory performance of the required services. Professional consultants should be individually selected for a specific project or problem with the objective of selecting the most qualified consultant at a price that is fair and reasonable. Professional service agreements shall not be split into smaller units, nor shall contract amendments be used, for the purpose of circumvention of the expenditure limits of this Policy.

As used in this Policy, "professional consultant service agreement" shall mean and include all professional services provided by the same consultant that are provided as part of or related to the same project or program for which the consultant is being

retained. Consultants who are retained to provide services on an ongoing basis, such as geotechnical peer reviews of District projects, shall be retained by means of an annual service agreement unless an agreement providing for renewal or extension of services has been approved.

- a. For selection of architects, landscape architects, engineers, surveyors, and environmental consultants, the following procedures shall apply unless the services needed from such consultants are of a technical nature or involve professional judgment.

Cost is not to be included in the Request for Proposal (RFP). Only after a firm is selected, is compensation negotiated. The scope of work is the basis for negotiations for payment. If the parties cannot agree on fair compensation, negotiations may be formally terminated with the firm considered most qualified and may be commenced with the second highest-rated firm. Such procedure may be repeated until an agreement is reached with a qualified firm.

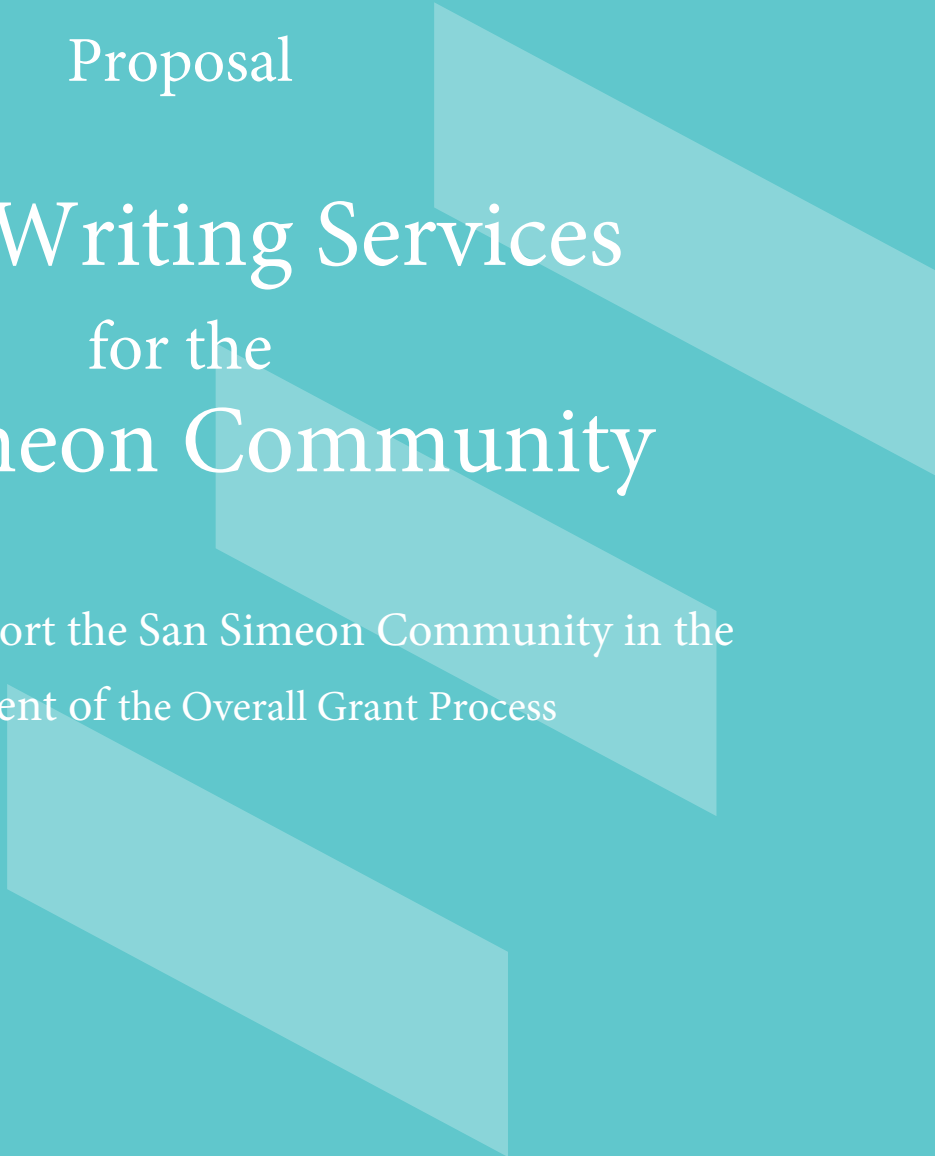
Alternatively, a fee or cost estimate can be requested at the time of the RFP by requiring it to be provided in a separate, sealed envelope. The fee estimate will only be opened after selecting the successful consulting firm.

- b. For consultants who do not fall under the qualifications-based selection method described above, or where the services needed from the vendors listed above are of a technical nature and involve professional judgment, cost can be included in the RFQ/RFP and used in ranking the consultants for selection. Examples of such consultants include, but are not limited to: training, safety, recruitment, personnel services, economic analysis, city and regional planning, property appraisals/analysis, property acquisition, title insurance, facilitators, legal services, financial services, and data processing.

#### Recommendation:

It is recommended that the Board may consider choosing one responsive contractor and authorize staff to enter into an agreement to provide services for the period of 3 years (July 1, 2022 – June 30, 2025).

Enc: Proposal – Littleberry Press / GrantSelect  
Proposal – The CrisCom Company



Proposal

# Grant Writing Services for the San Simeon Community

A Proposal to Support the San Simeon Community in the  
Management of the Overall Grant Process

June 2022

by Littleberry Press, West Lafayette, Indiana

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# Cover Page

## Grant Writing Services

Name of Respondent Firm:	<b>Littleberry Press LLC</b>
Principal Place of Business:	<b>1048 B Sagamore Parkway West, #48 West Lafayette, Indiana 47906</b>
Mailing Address:	<b>Same as above</b>
Primary Consultant/Contact:	Name/Title: <b>Louis S. Schafer, Lead Grant Consultant</b> Telephone: <b>(765) 237-3390 x1001</b> Email Address: <a href="mailto:lou.schafer@littleberrypress.com">lou.schafer@littleberrypress.com</a>
Secondary Consultant/Contact:	Name/Title: <b>Anita Schafer, Lead Grant Consultant</b> Telephone: <b>(765) 237-3390 x1000</b> Email Address: <a href="mailto:anita.schafer@littleberrypress.com">anita.schafer@littleberrypress.com</a>
Federal Tax Identification Number:	<b>82-2019317</b>
Type of Business Entity (check one):	<input type="checkbox"/> Sole Proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation <input type="checkbox"/> Joint Venture <input checked="" type="checkbox"/> Limited Liability Company <input type="checkbox"/> Individual. <input type="checkbox"/> Other _____
If other than a Sole Proprietorship:	<input checked="" type="checkbox"/> Offeror is a Compliant Non-California business incorporated or organized under the laws of the State of Indiana and enabled to do business in the State of California.  Date of incorporation/organization: <u>July 1, 2017</u>  All state(s) where authorized to transact business: <u>All U.S. states and its territories</u>  Names of all Offeror's parent, affiliate, and subsidiary organizations: <u>none</u>

The undersigned certifies that the information provided above is to the best of his/her knowledge true and correct, has carefully read and understands the terms and conditions specified herein and hereby submits the following proposal to perform the work specified herein, all in accordance with the true intent and meaning thereof, and further that the offeror/respondent shall comply with all terms, conditions, and requirements of the RFP.

The undersigned further understands and agrees that by submitting this offer: he/she is declaring his/her offer/response is not in violation of California Revised Statutes, concerning prohibited State contracts; he/she is certifying that the price(s) submitted was (were) independently arrived at without collusion; and the firm, Littleberry Press, is committed to performing all services identified and will abide by the terms of the RFP, including all attachments.

Louis S. Schafer  
Authorized (Original in ink) Signature

Louis S. Schafer  
Name (printed)

Lead Grant Consultant  
Title

June 1, 2022  
Date

## Qualifications

### **Brief Description / Overview:**

Littleberry Press LLC, formerly known as Schoolhouse Partners LLC, is an independent grant writing firm and book publisher committed to encouraging critical thinking and promoting constructive discourse within financial, social, cultural, political, and economic arenas affecting funding of community programs in the United States. Currently, we not only offer grant development/writing services, but we also offer grant writing training seminars and publish a series of grant funding directories for a broad range of communities, educators, and nonprofits. Though we remain a small, tightly aligned firm with fewer than a dozen employees, we are dedicated to our mission of “discovering and securing funding for all types of projects and programs, and to provide a platform to empower municipalities, pre-K through 12<sup>th</sup> grade educators, colleges and universities, community nonprofit organizations, and researchers all over the globe.”

For the past eighteen years, our strength has remained in grants development, working primarily with small to medium sized municipalities, as well as pre-K through 12<sup>th</sup> grade public and private schools, universities, and community nonprofits supporting those communities. At the local level, we have worked with mayors, township leaders, board members, stakeholders, department head (police, fire, tourism, parks, and recreation programs, etc.), school administrators, classroom teachers, and local community members. In doing so, it has always been the responsibility of our grants development team to ensure that project management occurs collaboratively, effectively, and efficiently so that each of our clients can fulfill their missions of public service to their respective communities.

Littleberry Press understands that the San Simeon Community Service District is a small unincorporated community located within San Luis Obispo County along California’s central coastal highway, about 36 miles west of Paso Robles and nearly equidistant from San Francisco and Los Angeles. Most recently, like most other smaller-sized California communities, local financial shortfalls in San Simeon’s economy have been further complicated by a drastic rise in inflation and the prolonged COVID-19 pandemic. With its population increasing by 42.4% during the last decade, growing from 462 in 2010 to 658 in the 2020 census, financial stress continues. Considered a “disadvantages” area, its average individual income is \$36,779 annually, with the average male earning \$59,688 and the average female earning just \$19,347. At the same time, though the national average family size is 3.13 individuals, San Simeon residents have an average family size of 3.21 and an average household size of 1.98 persons. With an overall poverty rate hovering around 4.4 percent, the community leaders and planners have found it necessary to wrestle with inadequate tax revenues while simultaneously attempting to ensure the health, safety, and well-being of all its citizens.



Meanwhile, San Simeon officials have begun weighing in on innovative options and creative solutions to support needed programs for its diverse population - including departmental staff training, community needs assessments, and program implementation – to assure continued community satisfaction and well-being. Yet, as stated earlier, pandemic challenges have exacerbated the funding concerns facing departments, education, and community services. Because of financial stress and shortages, towns of all sizes in all locations of California – including San Simeon - have continually struggled to balance needs against budget: a lessening of support programs; the ever-present needs assessment gap; inequity issues across the community; recruiting and retention of qualified (much less, excellent) community employees; and limited connectivity or access to adequate funding resources.

With all of this in mind, it is understood that the community of San Simeon must seek out and secure funding that goes beyond conventional tax-based sources. Our grants locator database, known as GrantSelect, is wholly owned and operated by Littleberry Press. It contains more than 30,000 funding opportunities for community-wide programs. These sources include federal and state agencies, corporate funders, private and public foundations, family trusts, and associations that will help to fill the community's current funding shortfalls needed to promote programs and expand services. In essence, the database will offer funding solutions for community and economic development, road and transportation needs, energy efficiency, environmental programs, criminal justice, technology, infrastructure maintenance and implementation, parks and recreation, and future community planning.

**Primary Responsibility for the San Simeon Contract:**

For this proposal, Littleberry Press will assign two on-call (up to full-time) Lead Grant Development Managers to oversee a gap analysis/needs assessment of current programs, funding research, and resulting grant writing projects (see attachment 1: Organizational Flow Chart). We will also utilize one on-call (part-time) Grant Development Specialist and three (3) Grant Writing Research Interns. Each of these individuals will collaborate with city departments to assess current funding priority areas and identify new priority areas for funding, as well as utilize all community resources that are made available.

The first of these Lead Grant Development Managers, Louis S. Schafer has been writing grants since 1981. Our second Lead Grant Development Manager, Anita Schafer has been involved with grant writing and funding follow-up services since 2004. Their joint focus has been on grant resources for communities, pre-K through 12<sup>th</sup> grade educators, and community nonprofits. Simultaneously, they have also been involved with the construction and maintenance of our extensive grants resource database since 2006 and have been publishing 12 to 15 grants directories for grant seekers of all types since 2007. Our current grant writing clients include four (5) municipalities, seven (7) public school districts, and more than two dozen community nonprofits.

As stated in the Commitment section of this RFP response, if chosen, Littleberry Press will identify specific grant opportunities to pursue that are aligned with both current and future funding priority areas of the community of San Simeon. It is understood that all assigned projects will be diverse, and vary in all aspects, based on need, current conditions, purpose, goals, and the availability of complementing opportunities. We realize that all such programs will be directly aligned with community outcomes and goals. In offering our expertise in grant development, we will provide all aspects of on-call grant writing services needed as determined by San Simeon officials.

**Assigned Administration: Experience, Staffing, and Structure:**

**Louis S. Schafer, Lead Grant Development Manager** (see Attachment 2 Resume), has a good deal of experience as a grant writer/developer/manager, beginning in 1981 with the Clare Public School District in Clare, Michigan. From there he went on to become an elementary school principal at Hillcrest Elementary in Alma, Michigan, followed by a district-wide grant writer with the Alma community in Alma, Michigan. Beginning in August of 1991, he pursued and secured funding for a variety of projects, including an innovative after-school mentoring program for elementary students known as Helping One Student to Succeed (HOSTS), an anti-bullying Safe Schools program, and funding aimed at changing the punitive school district environment to one of William Glasser's Choice Theory in which students have input in acquiring responsible behavioral choices. In 2003, after more than a decade of success in Alma, he relocated with Anita to the small, rural community of La Junta, an economically depressed region in southwestern Colorado, where he collaborated with staff as a curriculum director and grant writer for the highly at-risk East Otero School District. In 2004, Anita and Lou began working as independent grant writers for a variety of municipalities and school districts throughout the U.S., with Anita getting her first solo opportunity writing a successful \$20,000 program grant in support of an outdoor science lab in Wiley, Colorado. Together, they wrote and submitted a successful federal multi-year ***Kids in Safe Schools (KISS)*** anti-bullying grant for Las Animas Schools that was funded at \$704,800. Lou's primary role for this contract will be the responsibility of researching, developing, and writing inquiries, letters, and full proposals requesting funds in support of the community of San Simeon programs and services. He will also be responsible for tracking and monitoring proposals, interfacing with community personnel and resources, and tracking deadlines and requirements. Finally, he will submit monthly reports on progress of all hours worked and writing status.

**Anita M. Schafer, Lead Grant Development Manager** (see Attachment 3 Resume), also boasts a vast amount of experience as a grant writer/developer/manager, beginning with her application in support of an aforementioned elementary school science lab and a co-written funded \$704,800 U.S. Department of Education Safe Schools grant on behalf of a nearby school district. For the past 18 years, she has been responsible for the overall operation and organization of Littleberry Press, with a main function of selecting and training both grant writers and editors in support of gathering current and new grant sources, as well as grant book production. Her expertise in the

grant development process has, during the majority of that time, been utilized in both on-site and virtual grant writing training sessions for municipal and educational personnel all across the country. Most recently, she spearheaded a remote two-week grant writing training for 40 participants throughout the State of Wyoming, which included township supervisors, county clerks, classroom teachers, and other municipal personnel. This training led to an application submission by each participant for a variety of funding projects, including parks and recreation, municipal infrastructure projects, and community staff trainings. Anita's primary role for this contract will also be the responsibility of researching, developing, and writing inquiries, letters, and full proposals requesting funds in support of the community of San Simeon departments and services. She will also be responsible for planning and coordinating on-site and remote meetings with community staff members, upkeep of the calendar of events, and assisting in the management of collaboration with community staff.

**Joylynn Carter, Grant Development Specialist** (see Attachment 4 Resume), is a grant researcher/writer with years of experience as a city police officer. Her primary responsibility for this contract will be to conduct careful research of grant possibilities and alignment of grant funding opportunities with the community of San Simeon programs and mission. She will also spend time gathering descriptions, requirements, deadlines, amounts needed, geographic parameters, and past award samples. These details will then be uploaded into a list to be shared with community of San Simeon personnel. With her lengthy 20+ years of experience as a Chicago Police Officer, she brings much expertise into the arena of emergency services, safety, and protection of community assets. She possesses the unique ability to employ the principles of procedural justice to increase public awareness, trust, and confidence in local law enforcement, emergency agencies, and departments – and will help get work done on pressing legal issues. She brings to the table legal and safety legitimacy by way of understanding how to earn trust and confidence within community residents. She understands that the community can continue to build public confidence by:

- treating people with dignity and respect,
- making decisions fairly, based on facts, not illegitimate factors such as race or socio-economic history,
- giving people “voice,” a chance to tell their side of any vital story,
- implementing programs that are both culturally sensitive and inclusive, and
- acting in a way that encourages community members to believe that they will be treated with goodwill now and in the future.

**Support Intern Personnel:** Littleberry Press will also utilize up to two of its current interns to conduct research and background information, both in aligning possible funding prospects and gathering data that supports needs statements with the narrative of each grant being written. These interns are paid at a base salary rate of \$20 per hour and are available for a maximum of 15 hours per intern per week. For this contract, each will work a maximum of four (4) hours per grant.

### **Subcontracting:**

Littleberry Press will not subcontract any services offered within this proposal, and all services will be provided solely by its grant writing/development managers and its grant development support staff.

### **Taxable Transaction:**

Littleberry Press fully understands that the work to be performed under this solicitation is a business activity that may be taxable under the guidance of California Board of Equalization, which determines what is considered sales tax nexus in the State of California. An out-of-state business is “engaged in business” in California if it’s a member of a group in California that helps the out-of-state business establish or maintain a California market for product sales. Though Littleberry Press is not a tax-exempt organization, we further understand that, generally, services provided in California, such as grant writing, are not taxable.

### **Pending Litigation:**

Littleberry Press, nor any of its subsidiaries, have any pending litigation to which it is a party. Further, the firm has no outstanding legal judgements.

## **Project Methodology / Approach**

### **Motivation:**

Driven by a single question: "How do we help communities find and secure grants?" Littleberry Press embarked on pursuing its primary vision of assisting grant seekers to apply for funding to support any and every worthwhile program. For communities such as San Simeon, it is our mission to discover and secure funding opportunities for all types of projects and programs, and to provide a platform to empower administrators, departments, and community organizations to optimize the services for all of its permanent residents and visitors. The entire process is founded upon the a few simple principles:

- Collaborate with San Simeon officials to identify ongoing program and department needs
- Utilize a tried-and-true dependable method of identifying appropriate funding with our grants database
- Align those funding agency missions and goals with the San Simeon mission and goals
- Determine from funding agency guidelines an approximate number of hours and overall cost to develop submission(s)
- Receive a “go-ahead” from community officials

## **GrantSelect Defined:**

In simplest terms, GrantSelect is an online database of about 30,000 funding opportunities, such as grants (for programs, projects, planning, start-up, endowments, technical assistance, facilities, and equipment, etc.), awards, and fellowships. These funding opportunities range from operating grants to community and economic development, infrastructure, arts programs, biomedical and health care support, parks and recreation support, community services programs, children and youth programs, K-12 education funding, staff training, and overall program evaluation and improvement.

Each record includes:

- Contact information
- Sponsor name and address
- Subject terms for related searches
- Type of sponsor (Federal agency, foundation, research institute, etc.)

Each record also includes (where available):

- URLs to more information on the funding opportunity
- Deadline date(s)
- Restrictions on who may apply (including geographic restrictions)
- Lists of previous awards
- Amount(s) of grant or award
- Catalog of Federal Domestic Assistance (CFDA) number
- Populations encouraged to apply (e.g., women, minorities, disabled)
- RFA and PA numbers for NIH grants
- Program numbers for NSF grants

Sponsoring organizations include federal government agencies (including NIH, NSF, Centers for Disease Control, and many others), state government agencies, foundations and other nonprofit organizations, corporations and corporate foundations, educational institutions, and universities. Because of its broad range of funding opportunities, GrantSelect is able to service the entire community of San Simeon. Our goal is to enable the community and its organizations to find the funding opportunities needed to fuel economic growth and initiatives.

Town/City/County Managers or Commissioners, City Council, Aldermen, Law Enforcement Personnel and other First Responders, Chambers of Commerce, and Department heads use GrantSelect support to find funding for infrastructure, technology, parks and lands, playgrounds, trailway systems, housing, neighborhood beautification, community development, economic development, community health programs, infrastructure, sewage and solid waste management, brownfield management, flood control, records management, policing, emergency programs, after-school youth programs, youth mentoring, civic responsibility programs, service-learning programs, and more.

## **Service Distinctions:**

Littleberry Press is unique from all other offerors in that we provide:

- (1) Extensive concept-to-submission grant writing/development services via a collaborative, teamwork approach with each of our clients. This includes:
  - Assessment of programming by gathering information collaboratively
  - Strategy development
  - Utilizing our grants database and other sources to locate funding
  - Aligning program missions with funding source missions
  - Monitoring and communicating the status of grant development collaboratively throughout the entire process
  - Providing periodic written reports
  - Ensuring that all requirements are met in a timely fashion
- (2) Dynamic grant seeking access via our company-owned and operated grants database, which currently has more than 30,000 up-to-date funding opportunities from a variety of sources, including:
  - federal and state government agencies,
  - corporate giving programs,
  - public and private foundations,
  - family trusts,
  - associations, and
  - educational agencies
- (3) Skilled grant writing training (if requested) as a means for leadership, administrators, and other stakeholders to implement and sustain programs in the long term
- (4) Oversight and review of grant application created and written by staff
- (5) An Email Alert service to keep all staff participants apprised of upcoming funding opportunities, which are delivered directly to participants' email in-boxes

Littleberry Press fully understands that the community of San Simeon's overall goals, vision, objectives, and areas of highest need are centered around creating an environment of highest quality for each and every resident. Indeed, this is strongly aligned with our belief that, given enough time and support, every person can not only survive, but persevere and thrive. Furthermore, we believe, as the leadership of San Simeon does, that our shared primary goal should be to help individuals reach toward excellent standards of living, adequate and reliable services, social and emotional stability, a caring character, strong problem-solving skills, and the motivation to be lifelong community contributors.

## **Service Details:**

Littleberry Press conducts its grant development process by adhering to an established set of steps and procedures as we move from start to completion. Steps include:

- meeting with project stakeholders to jointly create and review a task checklist of what is wanted and needed to complete the application (DUNS, SAMS, board member, primary contact, biographies of key project personnel, letters of support, etc.); who is responsible will be assigned for each task; this checklist will be shared via an online tool so that everyone involved can stay abreast of progress
- discussion of key questions, including what your project is and what is your primary need, who will it impact, how does it align with the community's mission/vision, is this a new project/program or a continuation of an existing project/program, what is the timeline, how can we measure success, and what is the general overall cost of the project/program
- write a brief overview/history of the of the program asking for funding, and develop a Case of Support for the project/program
- begin discussion of the narrative and detailed budget process, determining how specifically every piece of that budget is priced out and revisited as the project begins to take shape
- introduce the grants database and discuss how to locate possible funders, aligning the community's mission with the funder's mission/areas of interest
- find an adequate number of possible funders to meet all budgetary demands
- organize all deadlines (if applicable) of all chosen funding organizations
- contact each funding organization and inquiry as to whether the community's project fits their current guidelines and areas of interest
- draft the initial proposal narrative, including an introduction of the grantee's program overview, problem/need statement, overall project goals/expected outcomes, and long-term sustainability
- develop methods and activities that will enable evaluators to reach outcomes
- create and evaluation rubric that exhibits Indicators of Success (data collection, percent of involvement, before and after changes, community perception changes, etc.) and how we will be able to measure/prove that success
- assign responsibility for implementation of each activity and outcome
- develop an overall timetable of project/program implementation
- design a PR program that will inform interested community residents and stakeholders about the project/program
- finalize both the budget detail (totals all line items of spending) and budget narrative (outlines precisely how the funding will be spent)
- ensure that the narrative proposal aligns tightly with all budget aspects
- gather any necessary attachments/addendums (support/collaboration/ commitment letters, proof of nonprofit status, list of board members with contact information, community-wide annual operating budget, annual audit, professional biographies of those involved with program implementation, DUNS and SAMS information (if required), and any other requested items)
- complete a cover letter and/or title page
- write an abstract/summarization of the entire proposal, including total amount being requested
- pull together an accurate table of contents, with proposal sections and page numbers

- secure all necessary signatures and approvals required for submission of the application
- carefully review the initial checklist to ensure completeness
- conduct a peer review assessment by two to three readers to get feedback on all of the above
- submit required number of copies of the entire proposal package to the funding organization
- conduct follow-up after the funder's board members have evaluated the project
- evaluate success measures as the project implementation progresses

**Assumptions:**

Littleberry Press understands that grant writing assumptions are what we believe to be true. In a contracted relationship with the community of San Simeon, these beliefs include anticipated occurrences and circumstances that are expected during the contractual duration. We make such assumptions based on our prior experience as grant development specialists. Our assumptions about such a contractual arrangement with the community of San Simeon include:

1. Our grants database – known as GrantSelect – will be the primary source of locating and aligning suitable upcoming grant funding opportunities at no additional charge to the community of San Simeon.
2. We currently have adequate personnel (both on-site and remotely) to complete grant development services on a large scale for the community of San Simeon.
3. With any increase in demand for skilled grant writing services, an adequate grant writing workforce can be secured and trained via internship and regular employment to handle whatever workload is necessary.
4. All relevant stakeholders in the community of San Simeon can and will attend regularly scheduled meetings, either in person or remotely.
5. All stakeholders in the community of San Simeon will be willing to collaborate closely with our staff, either in person or remotely.
6. With this collaboration, we will be able to develop tightly aligned proposal budget details and narratives that are tightly aligned these each proposal, thus justifying cost with request.
7. We will be able to communicate continually with community personnel and stakeholders as projects progress
8. We will be able to secure appropriate signatures of approval and compliance prior to submission of all grant applications.
9. Community officials will adhere to all promised made to funding agencies.

**Constraints:**

Littleberry Press fully understands the existence of project constraints to mean limitations or restrictions that may impact the grant development process. Such limitations and/or restrictions will be managed in all instances by Anita Schafer and Louis Schafer, the two dedicated project managers for this RFP, and may include the following grant writing project constraints:



1. **Cost Constraint:** at the start of each grant writing project, it is expected that the community of San Simeon will specify all expectations of the project. This will, indeed, come with a project cost constraint for all services rendered. For example, it may be stated that Littleberry Press will be compensated no less and no more than a specified range for its time in the development of a specific proposal. From that point forward, that range will remain that project's cost constraint.
2. **Scope Constraint:** the grant writing project scope reflects what needs to be completed within a specific approved project timeline. For example, if the collaborated decision is for a specific project to result in an increased community satisfaction rating of 10% over current rates of satisfaction, development of an acceptable evaluation tool to measure this increase is essential and must be coordinated by both community administration, stakeholders, and grant writers. Hence, if the scope is "an increase to senior citizens by a minimum of 10% of all senior citizen programming," this is an example of project scope constraint that will not allow a promise of a 20% increase by the grant writer.
3. **Quality Flexibility Constraint:** it is understood that all community departmental and services quality comes with a cost. Whenever there exists strictly outlined requirements in a specific grant writing narrative, this will impact the cost constraint directly. For example, if the project is the implementation of an after-school mentoring program using community volunteers as one-on-one reading mentors, the community might expect such a program to be offered to 10% to 20% of its current 5<sup>th</sup> grade students at a particular budgetary cost. Opening such a program to greater numbers of anticipated students or additional grade levels will likely incur an increased cost in materials and management of the increased number of volunteers. And, if greater community and student participant numbers lead to increased costs, we must be prepared to locate and secure increased financial support in order to maintain quality of programming and expected results.
4. **Satisfaction Constraint:** in all grant writing project cases, customer (residents, community serve organizations, and visitors) satisfaction is a key factor for program/project sustainability. Though all community of San Simeon departments and service providers conduct their business for individual residents and the community at large, the leadership will remain our primary customer for grant seeking services. We must first and foremost always satisfy that primary customer, making this is a critical constraint.
5. **Risk Constraint:** risk can be either positive or negative in any proposal or project. Littleberry Press will work with each community of San Simeon department or service provider to enhance the opportunities for positive risks and reduce the possibility of negative risks. For example, if there is any risk of losing a project participant or team member, either within our staff or the community's personnel, the project should specify a "hand-over" process for activities for which that team member has been responsible. If he/she should leave the project prior to completion, such responsibilities can be assumed by a new or replacement team member, thus reducing the risk of failure to reach designated outcomes.

6. **Resource Constraint:** some grant development project managers falsely believe that only project team members are considered project resources. However, technology tools, equipment, and other materials to be used in grant development projects are also resources. Thus, if a particular piece of equipment is made unavailable to project managers because of other use commitments, such resources automatically become project constraints and must be replaced when lost or displaced to other projects.
7. **Time Constraint:** when beginning any grant development project, there will be deadlines proposed by the project managers that are defined by the grant application itself. These may include required Letters of Interest and Application deadlines, or the implementation of a Needs Survey and Gap Analysis. Without question, these are time constraints that must be adhered to by both grant writers and collaborative community administrators and stakeholders.

### **Sustainability:**

As grant funding is depleted, Littleberry Press will support the community's efforts to sustain a given funded/implemented project (goals, principles, and efforts to achieve desired outcomes) in the following ways:

- meeting with stakeholders to develop a Calendar of Sustainability Readiness, so that they might “stay on top of” this inevitability
- discuss with stakeholders the possibility that grant-funded programs/projects may be considered sustainable even if they don't look exactly like the program that has been running
- re-assess specific activities that can and should be continued, how many employees/volunteers are needed for sustainability, and how large the continuing program should be
- base all sustainability efforts on the following considerations: data of success; change in needs of the original target audience; a list of what activities can be taken for sustainability; how to manage ongoing implementation; develop a list of current and potential partners; and locating and encouraging potential interest groups that have already benefitted from the program/project
- consider the following strategies for sustainability: fees for service; additional grant funding; community supporters; and state and federal dollars
- providing grant writing training to those who will need to search for and secure additional future funding organizations
- provide access to GrantSelect, our grants database, to accommodate future searches for possible funding organizations

## Experience

### **Our Commitment:**

Littleberry Press is extremely well-qualified to meet the grant writing services that the San Simeon needs and deserves. If selected, we will continuously identify specific grant opportunities to pursue that are aligned with the future of San Simeon's commitment and vision to help the community grow and thrive. It is understood that all assigned grant development projects will be diverse, and vary in all aspects, based on needs, current conditions, purpose, goals, and the availability of complementing opportunities. We realize that all such programs will be directly aligned with your mission of "protecting, building, and nurturing the entire community...while enhancing lives of all of its residents."

In offering our expertise in grant development, we will provide on-call, collaborative grant writing for all departments and services, including (but not limited to) Communication and Media Relations, Community Development, Community Education, Economic Development, Engineering, Emergency Management, Environment and Conservation, Fire Prevention Services, Information Technology, Library Services, Parks and Recreation, Police and Public Safety, Public Works, and Risk Management.

We fully expect to perform a variety of tasks related to grant opportunities, including (but not limited to): assessing needs and goals; conducting research to identify potential funding opportunities; offering an email alerts service for community officials to remain aware of upcoming grant opportunities; providing access to our grants database (if requested) to all administrators to conduct searches into possible funding opportunities; writing and submitting required/suggested pre-applications and/or Letters of Interest (LOIs); implementing an online calendar of grant opportunities to be shared throughout the entire community; coordinating a team approach with community stakeholders; implementing a shared on-line checklist of grant development steps to be taken and who is responsible for each step's completion; developing, drafting and finalizing all assigned applications; suggesting measurable means for evaluating success; developing budgets that are aligned with each proposal's narrative; adhering to schedules and deadlines for all applications; assisting with submitting required attachments and documentation; and monitoring the status of awards or rejections. Meanwhile, overall grant implementation and administration will remain the complete responsibility of the community of San Simeon.

### **Current and Past Projects:**

Littleberry Press offers the following three (3) most recent client references for whom we have successfully provided grant service included in the size and scope of this RFP:

<b>Client #1: <u>Town of Londonderry</u></b>	
Address:	268B Mammoth Road Londonderry, NH 03053
Primary Contact:	Justin W. Campo, Project Director
Client's Contact Info:	Phone: (603) 432-1102      Email: jcampo@londonderrynh.org
Project Duration:	Beginning: June 1, 2020 Ending: Ongoing
Description of project/services rendered:	<p>The Town of Londonderry, New Hampshire, began with Littleberry Press grant writing services by hiring us to write and submit a Coronavirus Emergency Supplemental Funding (CESF) award application to offset unbudgeted operating expenses due to the COVID-19 pandemic. The primary use of this funding was used to help defray the continuing unanticipated overtime salary, as well as equipment costs incurred in preventing, preparing for, and responding to this unexpected pandemic. Like most mid-sized New Hampshire communities, Londonderry has faced its share of extremely difficult budgetary decisions while battling the pandemic. In its community these included: overtime for police, fire, and emergency response personnel; COVID-19 testing and treatment for police, fire, and emergency response employees and their families; higher incidence of outbreak in economically challenged and low-income school district areas; and greater suspicion and mistrust of local, state, and federal government COVID-19 recommendations. As a result, forging an effective collaborative community response required the community to rely heavily on trusted local partners to perform essential tasks, such as: offering community education to inform the public on "best practices"; diagnosing and treating the coronavirus in a timely and optimal fashion; and distributing supplies to all citizens at-risk, including schools. Each of its planned activities in dealing with this pandemic were – and continue to be – based on the recommendation of the Center for Disease Control (CDC), the New Hampshire Department of Health and Human Services (DHHS), and the Londonderry Health Division. Funding in the amount of <b>\$89,112.18</b> was requested and awarded for a portion of police department and fire department staff COVID-19 overtime. Since that successful application award, we have continued to develop and submit proposals, primarily for public safety, fire, and EMT services. Most recently, we submitted a grant application in support of a <b>\$40,000</b> Endpoint Detection and Response (EDR) Cybersecurity system.</p>
Dollar Amount of Contract:	\$70/per hour
Success Rate:	100%

<b>Client #2: <u>State of Hawaii Department of Education (DOE)</u></b>	
Address:	1390 Miller Street Honolulu, HI 96813
Name of Client's Primary Contact:	Lorene Gokan, Procurement and Contracts Branch 940275 Mokuola Street, #200, Waipahu, HI 96797
Client's Contact Info:	Phone: (808) 675-0130      Email: lorene.gokan@k12.hi.us
Project Duration:	Beginning: January 15, 2021 Ending Ongoing
Description of project/services rendered:	<p>Littleberry Press began with the State of Hawaii Department of Education by submitting our response to an RFP for grant writing and support services on December 11, 2020. We were selected from a list of more than 50 responders. Since then, we have identified specific grant opportunities that are aligned with the goals of Hawaii education. It has always been understood that all assigned projects are unique to individual schools, and vary in all aspects, based on educational needs, current learning conditions, purpose, goals, and the availability of complementing opportunities. We also realize that all programs are expected to be directly aligned with student outcomes and achievement goals. In offering our expertise in grant development, we have provided all aspects of on-call grant writing services. This includes performance of a variety of tasks, such as: assessing needs and goals; conducting research to identify potential funding opportunities; offering an email updates for teachers and administrators to remain aware of upcoming opportunities; writing and submitting required/suggested pre-applications and/or Letters of Interest (LOIs); implementation of an online calendar of grant opportunities which is shared throughout the State school system; coordinating a team approach with school stakeholders; implementing a shared on-line checklist of grant development steps to be taken and who is responsible for each step's completion; developing, drafting and finalizing all assigned applications; suggesting measurable means for evaluating success; developing budgets that are aligned with each proposal's narrative; adhering to schedules and deadlines for all applications; assisting with submitting required attachments and documentation; and monitoring the status of awards or rejections.</p>
Dollar Amount of Contract:	\$65/per hour
Success Rate:	100%

<b>Client #3: <u>Trevecca Nazarene University</u></b>	
Address:	333 Murfreesboro Pike Nashville, TN 37210
Name of Client's Primary Contact:	Janice Lovell, Engagement Officer
Client's Contact Info:	Phone: (615) 248-1563      Email: jelovell@trevecca.edu
Project Duration:	Beginning: January 10, 2022 Ending: Ongoing
Description of project/services rendered:	<p>In collaboration with Persevere Now, a national non-profit organization whose mission is to empower justice-involved men and women and individuals at risk for justice involvement to succeed as productive members of society, Trevecca Nazarene University is committed to a partnership with Persevere Now with mutual interest to support the <b>Innovation and Opportunity Collaborative of Middle Tennessee</b> and beyond (2022-2025). Activities include, but are not limited to, project success through initiating collaborations, evaluation, sharing lessons learned, research, personnel management, human development, counseling or related human social services, and action committee participation. Littleberry Press has been contracted by Trevecca Nazarene University to collaborate on this grant project by conducting a needs assessment and gap analysis of approximately 50 proposal partners who will contribute regional services for the program clients. Without question, each of these collaborative partners was selected for a particular reason and, together, they balance Trevecca Nazarene's program aimed at improving the lives of justice-involved and at risk of being justice-involved individuals and their families in Middle Tennessee. Jointly, this collaborative intends to serve hundreds of families over a three- to five-year period, providing a web of coordinated services and support. As evidenced in Persevere's proposal abstract, the State's middle division is the region possessing the highest rate of incarceration within the United States (37,208 in Nashville alone). Our primary role in this project was to report details various gaps between "what is" and "what should be" within the collaborative partner support programs that can significantly impact the target population.</p>
Dollar Amount of Contract:	\$15,000
Success Rate:	Unknown currently

## References

(See project descriptions in Current & Past Projects section above)

Reference	Address	Telephone	Email
Justin W. Campo, Project Director	268B Mammoth Road Londonderry, NH 03053	(603) 432-1102	jcampo@londonderrynh.org
Lorene Gokan, Procurement & Contracts Branch	1390 Miller Street Honolulu, HI 96813	(808) 675-0130	lorene.gokan@k12.hi.us
Janice Lovell, Engagement Officer	333 Murfreesboro Pike Nashville, TN 37210	(615) 248-1563	jelovell@trevecca.edu

## Costs / Budgets

### Overview:

The RFP proposal budget below is intended to guide San Simeon evaluators in a step-by-step alignment with what we typically do as grant writers throughout the project phases and is meant to be changed and adapted (within limits, of course) to what happens during the grant writing process itself.

### State and Federal Grants (per project):

Phase / Task	Est. Hours to Complete (Senior Staff)	Est. Hours to Complete (Support Staff)	Senior Staff Hourly Rate	Support Staff Hourly Rate	Totals (hrs. x hourly rate)
Assessment	2-3		\$65	---	\$130 - \$195
Research (Senior Staff)	7-8		\$65	---	\$455 - \$520
Research (Support Staff)		7-8		\$20	\$140 - \$160
Initial Contact	1-2		\$65	---	\$65 - \$130
Pre-Proposal Letters (if required)	2-3		\$65	---	\$130 - \$195
Applications: Letter Proposal, including budget development	5-10		\$65	---	\$325 - \$650
Applications: Proposal for federal and state sources, including budget development	40-50		\$65	---	\$2600 - \$3250
Reports and Applications, per project	2-3		\$65	---	\$130 - \$195
<b>Totals:</b> Proposals sent to federal and state sources, including budget development	<b>59 - 79</b>		<b>\$65</b>	<b>\$20</b>	<b>\$3975 - \$5295</b>

**Foundation and Other Non-Government Grants (per project):**

<b>Phase / Task</b>	<b>Est. Hours to Complete (Senior Staff)</b>	<b>Est. Hours to Complete (Support Staff)</b>	<b>Senior Staff Hourly Rate</b>	<b>Support Staff Hourly Rate</b>	<b>Totals (hrs. x hourly rate)</b>
Assessment	2-3		\$65	---	\$130 - \$195
Research (Senior Staff)	7-8		\$65	---	\$455 - \$520
Research (Support Staff)		7-8		\$20	\$140 - \$160
Initial Contact	1-2		\$65	---	\$65 - \$130
Pre-Proposal Letters (if required)	2-3		\$65	---	\$130 - \$195
Applications: Letter Proposal, including budget development	5-10		\$65	---	\$325 - \$650
Applications: Proposal for foundations, and other non-government sources, including budget development	30-35		\$65	---	\$1950 - \$2275
Reports and Applications, per project	2-3		\$65	---	\$130 - \$195
<b>Totals:</b> Proposals sent to federal and state sources, including budget development	<b>49 - 64</b>		<b>\$65</b>	<b>\$20</b>	<b>\$3325 - \$4320</b>

**Insurances:**

If selected, Littleberry Press will ensure / acquire the following insurance policies:

- General Liability
- Automobile Liability
- Workers Compensation & Employers Liability
- Professional Liability and Errors and Omissions





# SAN SIMEON

Community Services District

Gwen Kellas, Chairperson  
Board of Directors

Charles Grace, General Manager  
Cortney Murguia, Office Manager  
Jerry Copeland, Plant Operator

Departments / City Services

Building Department	Community Development	Enterprise System	Community Development
Engineering	Economic Development	Emergency Management	Fire Department
Parks & Recreation	Library Services	Police Department	Utilities
Senior Citizen Programs	Cultural Programs	Public Schools	Historic Preservation
			Tourism

*Littleberry*  
PRESS

Grant Database Team

*Main Office*  
Lou Schafer, Grant Consultant  
Anita Schafer, Grant Consultant

Grant Researchers  
Grant Writers  
Budget Narratives and Details  
Submission & Follow-Up  
Municipal Collaborators  
Team Collaborators  
Database Managers  
Book Writing/Editing  
Book Art Design  
Manage Intern Pool  
Gap Analysis

Grant Development Team

*Remote Office*  
Joylynn Carter, Grant Support

Grant Writing Support  
Grant Researcher.

*Intern Pool*  
Purdue University Intern (1)  
Indiana University Intern (1)

Post-Award Team

*Remote Evaluator (if required)*  
Andrew Shepherd-Smith

Policy & Procedure Compliance  
Review of Reporting Compliance  
Mock Audits  
*Conduct*

1. Research Misconduct
2. Conflicts of Interest
3. Intellectual Property
4. Grant Fraud
5. Research lifecycle
6. Contract Language
7. Budget Compliance
8. Data Use/Misuse
9. Other Issues Required

# Louis S. Schafer

curriculum director / grant writer / school administrator

Resourceful, creative educator with 30+ years' experience in this capacity. Personal strengths: student-centered approach; curriculum development; inclusive leadership; assessment alignment; mastery teaching and learning; grant writing; budget building; program evaluation; recordkeeping; and ongoing communication with parents, educators, and the community.

*mobile* 765.421.1026  
*office* 765-237-3390  
*email* louschafer@gmail.com  
*address* 2529 Yeoman Lane  
W. Lafayette, IN 47906

## Philosophy

The single greatest power in the world today is the power to change...  
The most recklessly irresponsible thing we could do in the future would be to go on exactly as we have... - Karl W. Deutsch, 1977

## Competencies

- Extensive breadth of curriculum development / alignment
- Impeccable writing, editing, and time budgeting skillset
- Finely tuned grants development & management experience
- Highly collaborative work ethic involving all staff and parents
- Unparalleled assessment and evaluation of educational programs

## Experiences

### Remote Editor / Media Analyst

Mar 2019 – May 2020

TechMIS LLC, Dade City, Florida

- Compiled and prepared daily media briefings for federal departments, including Department of State and Housing and Urban Development
- Analyzed open-source and proprietary news pieces
- Real-time capturing of news from print, broadcast and social media
- Practiced with information technology and multimedia software
- Coordinated with team members to ensure daily product delivery

### Grants and Fundraising Director

Jan 2018 – Mar 2019

Hawaii Literacy, Honolulu, Hawaii

- Planned, prepared, and submitted competitive grant proposals
- Researched, identified, and cultivated new funding source prospects
- Built and developed funding budgets tightly aligned with proposals
- Participated as a team player in planning ongoing fundraising activities

### Co-Director / Owner / Operator

May 2005 – Present

GrantSelect / Littleberry Press, West Lafayette, Indiana

- Research, identify, and develop grant materials for a select few non-profit organizations and educational programs across the country
- Maintain an active, fluid service-product (GrantSelect) by researching, editing, and managing a 30,000-strong searchable grants database
- Edit and publish an annual series of grants directories via a co-owned and co-operated publishing firm (Littleberry Press)

## Education

**Specialist:** Educational Admin.  
Major: Leadership / Curriculum  
Central Michigan University 1996

**Master's:** Educational Leadership  
Major: Grant Writing / Curriculum  
Central Michigan University 1994

**Bachelors:** Education / Writing  
Major: Intensive Social Studies  
University of Toledo 1977

## Publications

### Funding Sources for K-12

Education (2006 – present)

### Funding Sources for Children &

Youth (2006 – present)

### Directory of Research Grants

(2006 – present)

### Directory of Grants in the

Humanities (2006 – present)

### Directory of Biomedical & Health

Care Grants (2006 – present)

### Funding for Comm & Economic

Development (2006 – present)

### Directory of Grants for Arts &

Culture (2006 – present)

### Operating Grants for Non-Profits

(2006 – present)

## Experiences (cont.)

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### Curriculum and Assessment Director

Aug 2003 – May 2005

East Otero School District, La Junta, Colorado

- Collaborated with administrators and teachers to develop and align curriculum, meeting all state standards and benchmarks
- Wrote and submitted letters of intent, proposals, budget details, and follow-up materials for private foundations and government agencies

### Elementary School Principal, Curriculum Director, Grant Writer

Aug 1991 – Jul 2003

Alma Public Schools, Alma, Michigan

- Implemented Mastery Teaching and Mastery Learning training for all elementary staff members
- Trained district-wide staff in William Glasser's choice theory, creating a non-coercive student atmosphere
- Ensured alignment of all coursework from 12<sup>th</sup> grade on down to pre-kindergarten levels

### Alternative and Adult Education Assistant Director/Classroom Teacher

Aug 1981 – Jul 1991

Clare Public Schools, Clare, Michigan

- Assisted in the improvement and implementation of high school completion coursework for more than 300 non-traditional students

### High School Teacher and Basketball Coach

Aug 1978 – Jul 1981

Piqua City Schools, Piqua, Ohio

- Taught high school Social Studies to 10<sup>th</sup> through 12<sup>th</sup> grades, including American History, World History, Geography, Economics, Sociology, and Psychology

## Memberships

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- |   |                |
|---|----------------|
| • American Grant Writers' Association                         | 2015 – Present |
| • National Grants Management Association                      | 2018 – Present |
| • National Council of Nonprofits                              | 2017 – 2019    |
| • National School Foundation Association                      | 2001 – 2009    |
| • National Association of Workforce Development Professionals | 2003 – 2011    |
| • National Staff Development Council                          | 1991 – 2016    |
| • Writer's Guild of America                                   | 1981 – 2012    |

## Personal Writing Projects

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Freelance writer and author, published in 200+ online and hard-print magazines, newspapers, and periodicals

Book Titles:	<i>Confederate Underwater Warfare</i>	1984 (still in print)
	<i>Best of Gravestone Humor</i>	1996 (still in print)
	<i>American Submariners, vol. I</i>	2018 (still in print)
	<i>Tombstones of Your Ancestors</i>	2019 (still in print)

## References

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Available upon request.

# ANITA SCHAFER

technical writer / editor / publisher

office: (765) 237-3390 ext. 1000  
mobile: (808) 638-4620  
email: anita.schafer@littleberrypress.com  
profile: linkedin.com/in/anitaschafer  
skype: abschafer\_3

## CORE COMPETENCIES

Prospect Research	Database Management
Proposal Development	Project Prioritization
Budget Management	Fundraising
Submission Calendaring	Program Development

## EXPERIENCE

### Grant Writer / Editor

[Littleberry Press](#) - September 2004 to present

- Develop and write grant proposals to foundations and other grant-making organizations, persuasively communicating clients' missions and programs to potential funders
- Assemble and submit grant requests, including letters, proposals, budgets and presentations
- Create and manage budgets for client programs and projects
- Maintain calendar to ensure timely submission of letters of inquiry, proposals and reports
- Strategize and research new funding prospects to support clients' programs and projects
- Prioritize projects to keep multiple projects moving in a timely manner, meet deadlines and manage supplemental material required for proposals.
- Serve as liaison to all funding agencies or organizations, developing collaborative relationships with grant funding representatives

### Remote Editor

[TechMIS](#) - December 2018 - May 2020

- Compile and prepare daily media briefings for Presidential Cabinet-level customers and their corresponding departments (Department of State, Department of Homeland Security)
- Read and analyze open-source and proprietary news pieces; real-time capture of relevant news from print, broadcast and social media
- Coordinate with multiple teams and team members to ensure timely delivery by established and modified deadlines
- Train new editors and media monitors; develop training guides and style guides to support onboarding and ongoing operations

### Founder / Executive Director

[Tria Gladius Fencing Foundation](#) - September 2012 - Present

- Coordinate with school officials to administer a quality after-school sports program for high school students at Harrison High School (West Lafayette, IN)
- Guide and mentor student officers, club members
- Provide individual and group fencing instruction, explaining and demonstrating the basic use of various equipment, principles, techniques and methods of fencing

## EDUCATION

### Master of Science in Education in Learning Design & Technology

Purdue University  
*Expected graduation: 2022*

### Bachelor of Arts, Professional Writing

Purdue University, August 2017  
Minor: Computer & Information Technology

## HONORS AND AWARDS

Alpha Sigma Lambda Inductee, April 2016

Best Visual Design--Purdue Writing Showcase, April 2016

Indiana POWER Caucus Award, February 2016

People's Choice Award--Purdue Writing Showcase, April 2015

William H. and Ruth E. Crouse Scholarship for Technical Writing, May 2015

Max and Elsie Goken Scholarship Award, May 2015

## PUBLICATIONS

### GrantSelect.com

(web; grants database; 2006 - present)

### Funding Sources for K-12 Education

(print; annual; 2006 - present)

### Funding Sources for Children and Youth Programs

(print; annual; 2006 - present)

### Directory of Research Grants

(print; annual; 2006 - present)

### Directory of Grants in the Humanities

(print; annual; 2006 - present)

### Operating Grants for Nonprofit Organizations

(print; annual; 2006 - present)

### Directory of Biomedical and Health Care Grants

(print; annual; 2006 - present)

### Funding Sources for Community and Economic Development

(print; annual; 2006 - present)



# JOYLYNN CARTER

jcarter79@gmail.com | 847-749-7313 | Chicago, IL 60656

## Summary

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Dedicated employee known for reliability, pursuing employment options where good work ethic and positive attitude will make a difference.

## Skills

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- Human relations
- Conflict resolution tactics
- Exceptional problem solver
- Calm under pressure

## Experience

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City Of Chicago Police Department |  
Chicago, IL  
**Police Officer**  
10/2001 - Current

- Gathered preliminary investigation information as first responder to crime scenes.
- Assessed crime scenes upon arrival and secured areas.
- Made arrests for violations of criminal laws and conducted background investigations.
- Mediated domestic-related disturbances and protected victims from harm.
- Responded to and investigated security and burglar alarms.
- Investigated criminal and traffic offenses.

U.S. Department of Veterans Affairs |  
Chicago, IL  
**Veterans Service Representative**  
09/2000 - 10/2001

- Interviewed veterans and dependents to determine eligibility for federal benefits.
- Assisted veterans in preparing forms, documents and applications for benefits.
- Reviewed claim folders for completeness and conformity to guidelines prior to submission for eligibility determination.

## Education and Training

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DePaul University | Chicago, IL  
**Bachelor of Arts in English Language And Literature**  
06/1997



by Littleberry Press, West Lafayette, Indiana

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CELEBRATING 25 YEARS OF SERVING OUR CLIENTS AND COMMUNITIES



[www.TheCrisComCompany.com](http://www.TheCrisComCompany.com)



## THE CRISCOM COMPANY

REQUEST FOR PROPOSAL FOR GRANT WRITING  
AND GRANT WRITING RELATED SERVICES



SAN SIMEON COMMUNITY SERVICES DISTRICT

RFP Released: April 3, 2022

RFP Due Date: June 2, 2022 at 2:00pm

Courtney Murguia  
Office Manager  
San Simeon Community Services District  
111 Pico Avenue  
San Simeon, CA 93452



June 2, 2022

Ms. Cortney Murguia  
Office Manager  
San Simeon Community Services District  
111 Pico Avenue  
San Simeon, CA 93452



Dear. Ms. Murguia:

The CrisCom Company is pleased to provide the San Simeon Community Services District with the following response to the "Request for Proposal for Grant Writing and Grant Writing Related Services."

Over the past 25 years, CrisCom has partnered with clients to assist them in positioning and developing impactful programs to better their communities. If awarded, we also acknowledge the complete responsibility for the entire contract.

Please do not hesitate to reach out if you require any clarification on the information contained in this response. I look forward to hearing from you soon.

Sincerely,

Charles H. Jelloian  
President & Chief Executive Officer  
(818) 378-1576 cell  
chuck@thecriscomcomapny.com



9550 TOPANGA CANYON BLVD., CHATSWORTH, CA 91311  
1099-A OTIS AVE., CORCORAN, CA 93212  
www.TheCrisComCompany.com

## **COST - SCOPE OF SERVICES - METHODOLOGY**

The CrisCom Company is proposing a monthly retainer to provide the San Simeon Community Services District with grant writing and grant writing related services. The fee for this service will be \$2,000 per month. This will encompass the following scope of services detailed below.

In providing grant writing services, The CrisCom Company will engage elected officials, key stakeholders and administrating agencies to develop advantageous relationships for the District. CrisCom will work in conjunction with District staff to identify and pursue viable grant opportunities. Additionally, CrisCom will work hand-in-hand with District staff to develop a strategic approach to providing for the District's needs through comprehensive advocacy and outreach efforts.

An in-depth approach and comprehensive strategic planning provides our clients with the proper footing to be successful in the pursuit of grants and other funding opportunities. A key element to this approach is incorporating the direction of the client. As such, the District will have direct access to CrisCom's leadership whenever it is needed.

The CrisCom team will meet with the San Simeon Community Services District to compile a list of projects. The team will then work with the District to prioritize the list based on a needs assessment, which will include a comprehensive review of available funding sources for the identified project. This collaborative approach is imperative to creating successful submissions. While CrisCom is continuously monitoring both public sector and private foundation grants, detailing the specific needs of the District will provide for a tailored and targeted approach.

The CrisCom Company will provide in-person quarterly reports to the District or any time the District deems appropriate. The CrisCom team will also make themselves available anytime to the District department heads and staff. We will provide weekly updates via email and telephone on the progress and status of grant applications in process as well. This will include benchmarking certain items during the writing process and keeping the District apprised of any changes or amendments.

As grant writing professionals it is imperative for our firm to have continual and open communication with our clients. Establishing this early on in the engagement is key to developing and implementing successful grant initiatives. Forecasting available opportunities and working with departments well in advance of Notice of Funding Opportunities will ensure ample time to respond to an opportunity thoughtfully and completely and lead to a successful proposal.

The following 10 step approach to grant writing is the core of CrisCom's grant writing service offerings. Putting our client's needs at the forefront of every project is key.

1. Funding needs analysis by meeting with District department heads to review priorities and funding needs  
The CrisCom Company staff will meet with District leadership to conduct a series of assessment meetings to prioritize the funding needs. The meetings will be in-depth and analyze programs and projects from available funding sources in which the District is ready to pursue. These meetings will lay the foundation for the grant pursuit process. In conjunction with these meetings, CrisCom will meet with the District's State and Federal representatives. These meetings will set the foundations of support to pursue the aforementioned grants, and will provide information to our representatives on the District's current needs.
2. Facilitation of department decision-making process regarding the feasibility of pursuing potential grant opportunities  
The CrisCom Company staff will meet with District department heads as grant opportunities become available. The meetings will include a summary review of grant requirements, including any qualifying factors such as monetary match, reporting requirements and grant oversight. These meetings will serve as strategic planning sessions.
3. Facilitation of partnership meetings on grant submissions  
The CrisCom Company will meet on a regular basis with District department heads, both in person and over the telephone as the grant is being developed. Communication with District staff is a key component to a successful grant submission. The CrisCom team will work diligently on ensuring that all lines of communication are open and flowing freely to identify the proper grant response and any cross departmental components to strengthen any submission.
4. Grant research to identify opportunities that strategically align with the District's goals  
The CrisCom Company will utilize various grant resources to narrow down and find specific opportunities for the District. This process will be aided by the initial departmental meetings to identify needs and connect them with available funding sources in the budgetary year. CrisCom will also work with the local State and Federal representatives to identify any direct funding opportunities.
5. Development of requested proposals/applications  
Each grant opportunity is unique and contains differing requirements. However, through meticulous attention to detail, CrisCom will work with the District to develop top quality responses to identified viable opportunities. This includes outlining clear and concise program goals to achieve the desired outcomes. CrisCom will work with the District to obtain the needed information and provide a comprehensive draft for the District to review. CrisCom will provide this at least a week in advance of the grant due date, as to provide adequate time for a comprehensive review before submittal.

6. Assist in gathering grant-related information  
The CrisCom Company will identify and assist the District in obtaining grant-related information needed for a successful submission. CrisCom's team is astute in garnering information and employing that information into a successful grant. CrisCom will also assist the District in reviewing the data needed for the grant. This includes breaking down the data into smaller pieces of useful information that will bolster the grant response.
7. Estimate of District's commitment if grant is received  
A key component to a grant is the grantee's ability to administer the grant successfully. During the initial review of the grant, prior to any submittal, the CrisCom team will review the grant guidelines and ensure the District and the department heads know the requirements of administering the grant. This will include any and all reporting requirements and the length of those requirements. CrisCom will assist the District in these requirements while on retainer. This will be a major determining factor to be considered during the facilitation of the departmental decision-making process regarding the feasibility of pursuing potential grant opportunities.
8. Grant proposal development, submission, letters of support and other supporting materials  
As discussed previously, The CrisCom Company will provide the District with a draft of the proposed submission at least one week prior to the due date. This will allow for adequate departmental review prior to submitting the grant application. CrisCom will also work with our State and Federal elected officials and strategize with local stakeholders on obtaining letters of support. Ensuring that the grant receives support from a variety of stakeholders speaks volumes with the grant reviewers. CrisCom will always look for ways to set the grant apart from the competition and work to obtain an advantage for the District.
9. Follow up after proposal submission  
The CrisCom Company will utilize its relationships with the granting entity to follow up on any and all proposal submissions. This will be done within the confines of the expressed grant criteria and will not take place in any gray areas. CrisCom will strategically utilize the grant supporters, such as our State and Federal representatives to inquire on the District's behalf, when appropriate. CrisCom will also seek to identify, if not explicitly expressed in the application, the proposed timeline the granting agency is looking to follow. This will allow for the District to manage expectations on funding and implementation.
10. Assist with contract, material development, and/or reporting once a grant is awarded  
The CrisCom Company will stay engaged during all aspects of the successful grant process. It is imperative to shepherd the District through this in order to maintain expectations of a successful implementation. Additionally, CrisCom can and will assist

on any and all reporting where necessary. Some functions of reporting will fall to the department who is awarded the grant, and CrisCom will assist in this process. Furthermore, on an unsuccessful grant proposal, CrisCom will request a debriefing from the granting agency. This will allow our team to comprehensively identify any deficiencies in the application and will bolster the application for the next round of funding.

## MISSION STATEMENT

OUR MISSION IS TO PROVIDE OUR CLIENTS WITH HIGHLY ETHICAL, INNOVATIVE AND DYNAMIC STRATEGIES, WHICH ARE EFFECTIVE IN ACHIEVING THEIR GOALS. THE CRISCOM COMPANY ADHERES TO THE HIGHEST STANDARDS OF ACCURACY AND TRUTH TO THOSE WE REPRESENT AND TO THE PUBLIC.

## EXPERIENCE

Founded in 1997, CrisCom Public Relations, Inc., (dba The CrisCom Company) is the preeminent leader in the governmental affairs, grant writing, public relations and community development arenas. We take great pride in providing our clients with unparalleled state and federal advocacy and grant writing services. The key to our success is our ability to engage elected officials, key stakeholders and administering agencies to develop advantageous relationships for our clients. Not only do we work in conjunction with our clients to identify and pursue viable grant opportunities, we develop a strategic approach to provide for our clients' needs through comprehensive advocacy and outreach efforts.

Our in-depth and thoughtful approach to strategic planning provides clients with the proper footing to be successful in the pursuit of appropriations and grants. The cornerstone to this approach is incorporating the needs and direction from our clients. This collaborative effort provides unfettered access to CrisCom's leadership team.

Our multidisciplinary team will meet with the client to compile a list of projects. We will then work with the organization to prioritize the list based on a needs assessment, which will include a comprehensive review of available funding sources for the identified project. This approach is imperative setting our clients on the path to success. We will also continuously monitor both public sector and private foundation grants, detailing the specific needs of the organization which will provide for a tailored and targeted approach.



- \$7m Kings County Sheriff's Office
- \$5.7m Corcoran Police Station
- \$4m Selma Police Station
- \$3m Lemoore Public Safety Dispatch
- \$650k Kings County Gang & Narcotics Task Force
- \$400k Sanger School Resource Officer
- \$250k Glendale DOJ COPS Grant
- \$240k Avenal Emergency Ops Center



- \$7m Corcoran Gateway Park
- \$2m Kettleman City Pedestrian Bridge
- \$2m Avenal Community Center
- \$1.2m CFDA Education Grant CLU
- \$312k Upward Bound Higher Ed Grant
- \$292k Clean CA Grant - City of Glendale, CA
- \$164k FEMA AFG - City of Glendale



- \$3m Sanger Water Well Repair
- \$2m Corcoran Water Treatment Facility
- \$1.5m Corcoran Water Well
- \$1.5m Selma Storm Drain Repair
- \$1m Sanger Water Connections
- \$100k Route Management Mile Reduction Grant

## THE TEAM

*Our team of experts boasts over 100 years of public/private sector experience. CrisCom continues to pave the way for our client's success in both the public sector and private sector. We have developed and implemented dynamic solutions for our clients that resulted in their securing of the most contentious contracts in the public sector. Our team's grant writing expertise is second to none, and we have been responsible for tens of millions of dollars in grant funding being secured.*

### Charles H Jelloian | President & Chief Executive Officer



Chuck Jelloian holds extensive experience in the public relations field. Through his tenacity and vociferous advocacy on behalf of our clients, Chuck makes sure the CrisCom team delivers on the projects we undertake.

About Chuck - Chuck is committed to providing all clients with highly effective programs that focus on governmental affairs, business and project development, strategic planning, corporate communications, public relations, and marketing.

Chuck has worked diligently to establish The CrisCom Company as one of the nation's premiere governmental affairs and business development firms. Before founding CrisCom, he served as the Executive Director of the non-partisan Ronald Reagan Presidential Foundation and was responsible for the planning and development of the historic Ronald Reagan Presidential Library and Center for Public Affairs, located in Simi Valley, California. He hosted numerous national and international dignitaries, including British Prime Minister Lady Margaret Thatcher and Polish President Lech Walesa. Since then, Chuck has had the privilege of working with several other national figures.

Chuck was appointed by Los Angeles Mayor Richard Riordan to serve on the Board of Transportation Commissioners. As Commission President, Chuck presided over the \$200 million department and its 1600 full-time employees. Los Angeles City Councilman Greig Smith appointed Chuck to the Design Review Board, which reviews all proposed applications for buildings and structures in the Chatsworth, California area.

Chuck, widely recognized for his leadership skills, continues to play an important role in many political, social and philanthropic activities throughout California and the nation.

Jason D. Siegen | Executive Vice President & Chief Operating Officer



Jason Siegen is a proven leader in the governmental and public affairs arena with over 20 years' experience throughout California and the nation, implementing successful lobbying and public relations campaigns for municipal, corporate, and non-profit clients.

About Jason - Jason has been a member of the CrisCom team since 1998. He serves as CrisCom's Chief Operating Officer and Executive Vice President. Jason is responsible for the day-to-day operations, including overseeing and managing CrisCom's Account Managers and Representatives. He has been a lobbyist at both the state and federal levels of government for over 20 years. Throughout this time, Jason has been at the forefront of all of CrisCom's legislative and appropriations wins for its clients. Jason's extensive experience in governmental and public affairs makes him a valued strategist and problem solver on which our clients rely. Jason holds a degree in Political Science from California State University, Northridge.

Carole E. Sarian | President of Public Affairs



Carole Sarian's enthusiasm, vision, and strong relationships in the public and private sector continue to benefit CrisCom's clients nationwide.

About Carole - Carole has been with CrisCom since day one and brings over 30 years of public affairs executive experience. She is responsible for the planning and producing of numerous high-profile events, galas, conferences, networking events, non-profit fundraisers and celebrations. Carole leads CrisCom's national philanthropic endeavors and has received several awards and commendations from some of the country's most prestigious volunteer and non-profit organizations.

Carole sits on the Hollywood Chamber of Commerce's Community Foundation Board of Directors, and Co-Chairs the annual "Heroes of Hollywood" fundraising event. This prestigious board is responsible for administering tens of thousands of dollars in grants annually to local non-profits in the greater Hollywood area. Previously, Carole served on the Executive Committee of the Board of Directors for the Hollywood Chamber of Commerce, which is responsible for the operation and maintenance of the world famous "Hollywood Walk of Fame."



Renee Missakian | Grants Manager - Community Development Coordinator



Renee Missakian's attention to detail and background as a paralegal helps ensure that our clients' projects are delivered timely and professionally. From community outreach to grant writing, Renee continues to deliver on our clients' needs.

About Renee - Renee has 25 years' experience in the legal field and over 15 years' experience working with nonprofit organizations. Her experience includes organizing fundraisers, community outreach events and public relations campaigns. For the past several years, Renee has spearheaded The CrisCom Company's grant writing initiatives for our clients, specializing in both public and private sector grants.

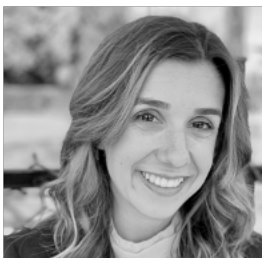
John Basmajian | Grant Coordinator - Accounts Representative



John Basmajian joined The CrisCom Company in 2019 as an Account Representative. His demeanor, energy and exuberance he brings to each project is palpable.

About John - John graduated from California Lutheran University with a Bachelor of Science in Business Administration, where he was an honored recipient of the Dean's List award four times, as well as the President's List award. He served as student body president, and sat on the university's Board of Regents. Prior to joining CrisCom he served as an intern for an industrial services company where he led a marketing campaign that resulted in fifteen percent revenue growth. He also worked with a real estate investment firm providing administrative assistance.

Emily Engelsgaard | Grant Coordinator - Accounts Representative



Emily joined The CrisCom Company in 2021 and currently serves as an Account Representative and Grant Coordinator. Her tenacity and willingness to tackle any obstacle help achieve our client's goals.

About Emily - Emily holds a Master's degree in American History and is a graduate of California Polytechnic State University, San Luis Obispo. Emily has extensive experience in customer service and as a legal assistant. Her background continues to be a beneficial asset to the team.

**REFERENCES**

<p><b>The Honorable Richard Valle</b>          Supervisor – County of Kings, CA          1400 W. Lacey Blvd.          Hanford, CA 93230          richard.valle@co.kings.ca.us          (559) 362-4664</p>	<p>The CrisCom Company has been instrumental in securing over \$25 million in funding for the County of Kings and its local communities. This includes Prop. 68 grants as well as direct funding allocations through the State budget process.</p> <p>Effective date of contract:          07/01/2020 – current</p>
<p><b>Mr. Roubik Golanian</b>          City Manager – City of Glendale, CA          613 E. Broadway          Glendale, CA 91206          rgolanian@glendaleca.gov          (818) 548-4844</p>	<p>The CrisCom Company has identified and written several successful grant applications for the City of Glendale, including grants that focus on parks, sanitation and public safety focused grants.</p> <p>Effective date of contract:          02/01/2019 – current</p>
<p><b>Dr. Kindon Meik</b>          Former City Manager – Corcoran, CA          Current City Manager – Calabasas, CA          100 Civic Center Way          Calabasas, CA 91302          kmeik@cityofcalabasas.com          (559) 333-0310</p>	<p>The CrisCom Company has secured millions of dollars through grant writing and advocacy for the City of Corcoran. This includes funding for a new police station, water well funding and Proposition 68 park funding</p> <p>Effective date of contract:          07/01/2006 – current</p>

**TOTAL PROJECTED COST OF A PROJECT**

The CrisCom Company is proposing a monthly retainer to provide the San Simeon Community Services District with grant writing and grant writing related services.

The fee for this service will be **\$2,000 per month**.

## **6.B. Business Action Item**



## **BUSINESS ACTION ITEM STAFF REPORT**

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### **ITEM 6.B. BOARD DISCUSSION, CONSIDERATION, AND APPROVAL OF PROPOSALS RELATED TO ENVIRONMENTAL PLANNING SERVICES FOR THE PERIOD OF THREE YEARS.**

The District currently employs Jeff Oliveira (Oliveira Environmental Consulting) to perform on-call environmental planning services on behalf of the District. Between the period of July 1, 2021 – May 31, 2022 the District has paid OEC a total of \$ 25,505.21. The District has an inherent need for uninterrupted continuation of these types of services. Historically, these services have been performed by an outside contractor.

On March 30, 2022 GES Staff mailed a request for proposal related to environmental planning services to thirty-nine (39) companies.

The District received three responsive proposals from the following firms:

- 1) Oliveira Environmental Consulting, Inc.
- 2) Padre Associates, Inc.
- 3) Terra Verde Environmental Consulting, LLC.

The purchasing states the following:

#### **E. Professional Consultant Services**

##### **1. Definition and Restrictions**

Professional consultant services are of a technical nature and, due to the type of services to be provided, do not readily fall within the "low bid" competitive bidding process. California Government Code Section 4525 *et. seq.* requires that selection of professional consultants in the categories of architects, landscape architects, engineers, surveyors, and environmental consulting be made on the basis of demonstrated competence and the professional qualifications necessary for the satisfactory performance of the required services. Professional consultants should be individually selected for a specific project or problem with the objective of selecting the most qualified consultant at a price that is fair and reasonable. Professional service agreements shall not be split into smaller units, nor shall contract amendments be used, for the purpose of circumvention of the expenditure limits of this Policy.

As used in this Policy, "professional consultant service agreement" shall mean and include all professional services provided by the same consultant that are provided as part of or related to the same project or program for which the consultant is being retained. Consultants who are retained to provide services on an ongoing basis, such as geotechnical peer reviews of District projects, shall be retained by means of an annual service agreement unless an agreement providing for renewal or extension of services has been approved.

- c. For selection of architects, landscape architects, engineers, surveyors, and environmental consultants, the following procedures shall apply unless the services needed from such consultants are of a technical nature or involve professional judgment.

Cost is not to be included in the Request for Proposal (RFP). Only after a firm is selected, is compensation negotiated. The scope of work is the basis for negotiations for payment. If the parties cannot agree on fair compensation, negotiations may be formally terminated with the firm considered most qualified and may be commenced with the second highest-rated firm. Such procedure may be repeated until an agreement is reached with a qualified firm.

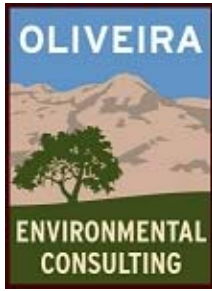
Alternatively, a fee or cost estimate can be requested at the time of the RFP by requiring it to be provided in a separate, sealed envelope. The fee estimate will only be opened after selecting the successful consulting firm.

- d. For consultants who do not fall under the qualifications-based selection method described above, or where the services needed from the vendors listed above are of a technical nature and involve professional judgment, cost can be included in the RFQ/RFP and used in ranking the consultants for selection. Examples of such consultants include, but are not limited to: training, safety, recruitment, personnel services, economic analysis, city and regional planning, property appraisals/analysis, property acquisition, title insurance, facilitators, legal services, financial services, and data processing.

#### Recommendation:

It is recommended that the Board may consider choosing one responsive contractor and authorize staff to enter into an agreement to provide services for the period of 3 years (July 1, 2022 – June 30, 2025).

Enc: Proposal – Oliveira Environmental Consulting, Inc.  
Proposal – Padre Associates, Inc.  
Proposal – Terra Verde Environmental Consulting, LLC.



3155 Rose Avenue  
San Luis Obispo, CA 93401  
(805) 234-7393  
jeffo@olive-env.com  
www.olive-env.com

May 23, 2022

Gwen Kellas, Chairperson  
San Simeon Community Services District  
Board of Directors  
111 Pico Avenue  
San Simeon, CA 93452

**Subject: Proposal for Providing Permitting Support, Regulatory and Jurisdictional Agency Coordination, Environmental Services, Project Management and Support on an As-Needed Basis**

Dear Gwen:

Thank you for the opportunity to assist the San Simeon Community Services District (SSCSD) with on-call project permitting support, regulatory and jurisdictional agency coordination, environmental services, project management and general support services for SSCSD projects on an as-needed basis. In response to your request, Oliveira Environmental Consulting LLC (OEC) is pleased to submit this proposal for providing on-call support services for SSCSD projects.

With over 20 years of experience which includes regulatory agency permitting coordination and environmental impact analysis for local agency projects, as well as technical reporting and multi-agency coordination for projects in multiple jurisdictions and coastal communities, including multiple years of service with the SSCSD, we look forward to the opportunity to continue applying our experience by bringing value-added assistance in support of ongoing SSCSD project management efforts. OEC would be pleased to provide further information regarding our qualifications, including professional resumes, upon request.

## OEC Qualifications

SSCSD permitting and environmental project management will be managed by Oliveira Environmental Consulting LLC. OEC's Principal-in-Charge is Jeff Oliveira. Jeff will be responsible for quality control and the response to project management needs for the SSCSD and will have the overall responsibility of coordinating projects and executing the day-to-day work effort.

OEC brings extensive experience in environmental impact analysis and jurisdictional agency permitting, project site constraints assessment, natural resource management, urban/rural planning, cultural resource management, multi-discipline team management and jurisdictional agency permit coordination. This includes extensive experience in CEQA compliance, NEPA

determinations and Federal/State grant funding agency coordination, as well as land use planning and agency coordination and a background in archaeological and historic resources, biology, botany, municipal and capital improvement planning, wildlife management, and ecology. This experience also includes the management of complex coastal development projects and coordination with local and California Coastal Commission staff.

As the founder and Principal Environmental Planner for OEC, Jeff Oliveira has over 20 years of professional experience between the private consulting and public agency sectors managing and writing a multitude of environmental impact analysis and land use studies for a wide variety of projects. With extensive experience in the direction and preparation of CEQA determinations, Jeff has the ability to utilize extensive public outreach, multidisciplinary technical expertise and interagency coordination to guide projects through a complex permitting process, including multi-year CEQA compliance projects.

As a private consultant and as a former Environmental Resource Specialist for the San Luis Obispo Planning and Building Department, Jeff has direct experience working closely with local agency staff on multifaceted permitting projects and environmental determinations.

In addition, Jeff has direct experience working for the San Simeon CSD. Jeff managed the complicated after-the-fact Coastal Development Permit application and review process for the SSCSD Wastewater Treatment Plant. This experience also includes the environmental review for the District's water reservoir expansion project, and management of the emergency permit process and follow-up land use permit for the Pico Avenue Bluff Erosion Repair project while securing fee waivers to ensure that the SSCSD was not required to pay for the necessary permits.

As a coordinator and panelist for the semi-annual AEP CEQA Workshop series for over 13 years and as a guest lecturer for the Cal Poly State University Department of Environmental Management and Protection, Jeff has a demonstrated commitment to monitoring the evolution of environmental legislation, training and environmental education.

As the former manager of the County's Cultural Resources program and Chairman of the City of San Luis Obispo Cultural Heritage Committee, Jeff has demonstrated strong leadership in the role of cultural resource conservation, land use planning, and a commitment to archaeological, Native American and historic resource management. Jeff's County experience also includes the implementation and management of the County's SB 18 program and associated Native American consultation management, as well as performing the final review of all CEQA determinations for major grading projects.

## **Organization and Subcontractors**

Although Oliveira Environmental Consulting LLC proposes to work independently, OEC is in a position to assemble a multi-disciplinary team of highly qualified professionals who are accomplished experts in a variety of planning and environmental issues as any particular project might demand. OEC has excellent working relationships with many consulting firms in the region. We believe this capability provides OEC with the flexibility needed to meet any need depending on the project. Although the majority of projects are not likely to require the use of



subcontractors, we feel that if the need should arise for project-specific assistance, we could apply additional assistance on an as-needed basis.

Jeff Oliveira will be the principal manager of any contracts initiated on behalf of OEC. SSCSD staff would continue to work directly with Jeff, ensuring the highest quality management and experience is applied to a given project.

## Scope of Services

In accordance with your request, Oliveira Environmental Consulting LLC is pleased to assist SSCSD staff with the management of project permitting and regulatory coordination, environmental services, project management and staff support services for various projects on an as-needed basis.

The tasks below are intended to provide the initial steps necessary for meeting project requirement tasks associated with SSCSD projects (including but not limited to projects such as the SSCSD Wastewater Treatment Facility Riprap Notice of Violation). The following is an example of the on-call services likely requested based on our experience working with the SSCSD over the years. However, it should be noted that additional tasks in accordance with OEC expertise will be available for SSCSD staff assistance as well.

- Review of existing documents prepared for a given project and research necessary to address information needs (including, but not limited to company project permit applications, staff reports, project maps, digital and GIS files, exemplary projects, applicable agency regulations, etc.);
- Coordination and communication between other agencies, consultants and organizations involved in any given project to ensure timely completion of project milestones, information requests, facilitating and coordinating project approvals through multiple agencies, ongoing efforts before and after submittal of the permit application packages. This task includes the time for continued support and coordination with project team members and the agencies to address questions and requests for clarifications and additional information. This task is also intended to cover meetings with the project team. Project management includes client and project team communications, meetings, and contract administration.
- Project permitting management (includes coordination and communication with the local lead agencies to determine any needs for environmental determinations and land use permits, assistance with any permit applications needed, and the review of applicable ordinances, General Plans, policies and codes for project consistency and permit needs);
- Project management duties. This includes attendance at meetings and hearings to support the project permitting process, communication with SSCSD staff, response to comments and questions as applicable, site visits to assess any environmental constraints, establishing timetables for milestone completion, coordination of multi-disciplinary subcontractor teams to ensure completion of technical reports, etc.;

- Grant Application and Implementation Support. This task includes continuing to support SSCSD staff with various grant funding applications, information requests from funding agencies, communications, environmental report preparation as required, application coordination, and coordination of condition compliance requirements for approved projects;
- Additional Tasks. This includes the creation of original technical reports needed for local lead agency and regulatory agency permitting, synthesis of existing studies and reports into succinct documents to meet agency permit application needs, preparation of environmental constraints analysis to assist PXP staff and regulatory agencies with project planning and efficient environmental review.

## Pricing and Invoicing

Oliveira Environmental Consulting LLC understands that some projects would involve preparation of specific proposals on a project-by-project basis, the costs and scope of such projects would be verified through the SSCSD prior to project initiation. However, certain SSCSD tasks (especially time-sensitive tasks) would benefit from our ability to start assisting staff right away. As such, the purpose of this proposal is to provide the SSCSD with the ability to engage OEC services quickly, on a time and materials basis as stipulated herein.

Under this agreement, work orders would typically be invoiced on a time and materials basis and/or deliverables with a not-to-exceed agreement and submitted on a monthly basis as needed. OEC's Fee Schedule is as follows: Principal Environmental Planner \$120/hour; Senior Project Manager \$100/hour; Assistant Project Manager \$90/hour, GIS Specialist and Administrative Staff \$80/hour. However, it is important to know that this rate is flexible based on the needs of the SSCSD and can be lowered to meet the demands of a given project or budget (especially long-term projects with extended time frames). Any use of subcontractors or reimbursable expenses would be billed at a cost plus 15%.

Document production costs are estimated in advance of production on a per unit basis. Vehicle mileage will be reimbursable consistent with the Federal rate allowable by the IRS in the current year. OEC invites any comments on this proposal and will make changes as requested.

Thank you for considering Oliveira Environmental Consulting LLC for your staff support needs. If you have any questions about this scope of services, please feel free to contact me anytime at 805-234-7393 (jeffo@olive-env.com).

Sincerely,



**Jeff Oliveira, Principal Environmental Planner**  
Oliveira Environmental Consulting

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# **ON-CALL PLANNING, PERMITTING, AND ENVIRONMENTAL SERVICES**

## **STATEMENT OF QUALIFICATIONS**

**Project No. 2202-1401**

**Prepared for:**

San Simeon Community Services District  
111 Pico Avenue  
San Simeon, California 93452

**Prepared by:**

Padre Associates, Inc.  
369 Pacific Street  
San Luis Obispo, California 93401

**JUNE 2022**



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ENGINEERS, GEOLOGISTS & ENVIRONMENTAL SCIENTISTS

June 2, 2022

Project No. 2202-1401

San Simeon Community Services District

111 Pico Avenue

San Simeon, California 93452

Attention: Charles Grace, General Manager

Subject: Statement of Qualifications to Provide On-Call Planning, Permitting, and Environmental Services for the San Simeon Community Services District

Dear Mr. Grace:

Padre Associates, Inc. (Padre) is pleased to submit this Statement of Qualifications (SOQ) in response to the Request for Proposals (RFP) for On-Call Planning, Permitting and Environmental Services for the San Simeon Community Services District (District) issued on March 30, 2022. This SOQ has been prepared in accordance with the requirements listed in the RFP. There is no pending litigation against Padre and no history of bankruptcy or insolvency proceedings. There are no conflicts of interest between the District and Padre staff and if necessary, all subcontractors will be approved by the District prior to starting work. If awarded an on-call contract, it is Padre's intention to adhere to the provisions described in the RFP.

Below is Padre's contact information for this SOQ:

Padre Associates, Inc.

369 Pacific Street

San Luis Obispo, California 93401

Crystahl Taylor, Senior Project Manager

[ctaylor@padreinc.com](mailto:ctaylor@padreinc.com)

(805) 786-2650, ext.111

Padre is a multidisciplinary consulting firm assisting clients in the fields of environmental sciences and geoenvironmental services. Padre has a highly qualified team of in-house experts who are experienced with California Environmental Quality Act (CEQA)/National Environmental Policy Act (NEPA) processes, regulatory coordination, analysis and permitting, construction mitigation and monitoring, biological, archaeological, air quality, noise, and other technical analyses required for the District-related projects. Padre also has experience including federally funded projects requiring Federal Highway Administration (FHWA) and California Department of Transportation (Caltrans) involvement and approval. Because of our responsive approach, project management, technical capabilities, experience, and familiarity with the San Simeon area, Padre's team is well suited to assist the District with on-call environmental services.

Our team has the project management, environmental planning, and technical experience necessary to assist the District with their Community Services projects with the following tasks:

- CEQA/NEPA Environmental Documents
- Development Plan Review
- Federal, State, and Regional Regulatory Permitting

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**369 Pacific Street • San Luis Obispo, CA 93401 • (805) 786-2650 • [www.padreinc.com](http://www.padreinc.com)**

- Initial Studies
- Biological and Special-Status Species Surveys/Consultations
- Wetland Delineations
- Biological Assessments and Biological Resource Assessments
- Regulatory Agency Permitting (i.e., Section 404 Section 401, Section 1602, etc.)
- Site Restoration Plans and Revegetation Plans
- Habitat Restoration
- Cultural and Historic Resource Evaluations
- Native American Consultation
- Noise Studies
- Air Pollution Dispersion Modeling and Emission Inventories
- Compliance/Construction Mitigation and Monitoring
- Mitigation Monitoring/ Post-Construction Reporting Programs
- Geologic Hazards Studies
- Asbestos Surveys
- Lead Surveys

Padre's SOQ is valid for 120 days. If you should have any questions regarding Padre's SOQ and/or require additional information for review purposes, please contact Crystahl Taylor at (805) 786-2650, ext. 111.

Sincerely,

Padre Associates, Inc.



Crystahl Taylor  
Senior Project Manager

Enclosure: Statement of Qualifications

## 1.0 INTRODUCTION

**Padre Associates, Inc. (Padre)** is pleased to submit this Statement of Qualifications (SOQ) to the San Simeon Community Services District (District). Padre is a local consulting firm with an office in San Luis Obispo and additional offices in Ventura, Sacramento, and Bakersfield, California. Our firm is comprised of experienced professionals with a dedication to the preparation of quality work products, within budget, and on schedule; and a strong commitment to establishing and maintaining positive client relationships.

Padre has assembled a highly qualified team of in-house experts who are experienced with the California Environmental Quality Act (CEQA) and National Environmental Policy Act (NEPA) processes, regulatory analysis, coordination, and permitting, construction mitigation and monitoring, and the biological and archaeological technical analyses required for the District's Capital Improvement projects. Padre has ample experience providing planning, permitting and other environmental services to projects within unincorporated, coastal and mountainous regions. The firm holds contracts in good standing with clients of other cities and counties, positioning Padre as a competitive candidate to provide on-call planning, permitting and environmental services to the District. Because of our responsive approach, project management and technical capabilities, experience, and familiarity with the San Simeon area, we feel that the Padre team is well suited to assist the District with its future project objectives.

We have made every effort to keep this proposal brief, concise, and responsive to the District's Request for Proposals (March 2022). Included below is a brief summary of the salient points of the SOQ:

- Section 2.0 describes Padre's Personnel/Firm including key operating practices and capabilities;
- Section 3.0 summarizes Padre's qualifications and representative project experience;
- Section 4.0 provides the background and experience of Padre's key personnel and Padre's approach to project management and client communication;
- Section 5.0 provides Padre's scope of services relevant to District projects;
- Section 6.0 states the key staff with associated billing rates that would be assigned to work on projects with the District; and
- Section 7.0 provides contact information for recent clients familiar with Padre's environmental work applicable to future District projects.



## 2.0 FIRM OVERVIEW

Padre is a California-certified small business (No. 0025798) multidisciplinary consulting firm with complementary service lines in environmental sciences, geoenvironmental services, and geotechnical/civil engineering. Padre employs 60 staff across our San Luis Obispo, Ventura, Bakersfield, and Sacramento offices, with our headquarters in Ventura, California. Padre was established in 1996 by four senior professionals who are committed to the development of a multi-service, mid-sized consulting firm focused on local and regional projects. Padre's founding Principals and key staff each have more than 33 years of local professional experience, and a minimum of 28 years working together directly.

Padre has Master Service Contracts/On-Call Service Agreements to provide environmental services, including CEQA compliance and special studies, with numerous public agencies (e.g., City of San Luis Obispo, County of San Luis Obispo, Ventura County Public Works Agency, County of Santa Barbara, County of San Benito, etc.). We have had agreements in place with most of these agencies for over 20 years.

Our goal is to provide our clients with high-quality, timely, and cost-effective permitting, planning, and environmental services that exceed our clients' requirements. We value professional relationships with our clients and pride ourselves on their satisfaction. Satisfied clients are our best testament to our commitment to quality. We encourage the District to contact the references identified in Section 7.0 of this SOQ.

### 2.1 TECHNICAL APPROACH

Padre contends that the following points set us apart from our peers:

**Key Staff.** Our staff have a proven track record of successfully completing projects. Staff members are locally-based and have a history of positive working relationships with clients throughout their careers.

**Pool of Resources.** Padre has an extensive pool of qualified professionals offering a wide range of expertise who collaborate internally and are quickly accessible for agile team management and service delivery.

**Providing Customized Services.** As a growing small firm, we have the flexibility to customize our services to match client requirements. Our involvement can range from complete management of a complex, multi-disciplined project, to assisting with limited aspects of a client-led project.

**Strong Relationships with Governmental and Regulatory Agencies.** Padre staff has strong, well-developed working relationships with local, regional, State, and Federal regulatory agencies. Our staff's reputation for quality performance and knowledge of continually changing regulatory requirements enhances our ability to assist in regulatory negotiations on behalf of our clients.

**Complimentary Service Lines and Technical Capabilities.** Padre provides balanced, cost-effective, and unique solutions through a blending of complementary technical service areas and capabilities that are tied together through sound policy, planning, and project management principles.

**Proven Management Approach.** Padre utilizes a proven management approach tailored to the client's needs, ensuring quality and timely response and completion of task requests. Continuous feedback loops are utilized to afford internal training of team members. A single point of contact is maintained with client staff to ensure continuity and consistency of project communications.

**Commitment to our Clients.** Meeting our clients' needs regarding quality, costs and timing, as well as ensuring environmental and regulatory compliance is paramount. Padre manages assessment programs with an "end-point" driven approach, where project completion and client satisfaction are an integral part of our goal to provide clients with total solutions to their projects.

**Involvement of Senior Staff.** Experienced senior staff members are actively involved in daily project work and are readily available to address project related issues. These senior staff members generally have 15 to 25 years of applied experience in their field of specialty.

## 2.2 PROJECT MANAGEMENT

Ms. Crystahl Taylor will manage the District's contract from our San Luis Obispo office, if awarded. Ms. Taylor will work closely with District staff and will involve the appropriate Padre staff for each project assigned. During the project setup, the budget and schedule for each task and the tools required to monitor the progress of the work will be established.

During project execution, the Project Manager assigned to the project is tasked with monitoring and controlling the budget, schedule, conformance to project requirements, and assembling a permanent record (file) of the project. Project monitoring is an interactive part of tracking and is firmly tied to project planning. It takes the outputs of tracking and uses them to determine planned versus actual budget and schedule.

Padre utilizes Deltek AJERA which is an integrated project management and accounting system that ensures accurate and up-to-date, communication and accessible reporting. The following is a partial list of AJERA features that Padre utilizes on a daily basis:

- Project Command Center: single interface for project setup, budgeting, and reporting;
- Customizable project views by user;
- Project reporting: real-time, drill through, work in progress, billed, budgeted, and spent (dollars and hours);
- Project budgeting: top—down, bottom-up, or by distribution;
- Timesheets and expense reports: integrated, electronic approval workflow;
- Invoicing: backup detail, adjustments, invoicing groups, rate tables; and
- Billing review: paperless for internal billing process.

### **3.0 EXPERIENCE SUMMARY**

#### **3.1 GENERAL QUALIFICATIONS AND CAPABILITIES**

Padre's key personnel include Environmental Planners, Biologists, Certified Ecologists, Archaeologists, Registered Civil Engineers, Registered Geologists, Certified Engineering Geologists, Certified Hydrogeologists, a Certified Environmental Manager, Construction Managers, and Qualified Storm Water Pollution Prevention Plan (SWPPP) Developers and Practitioners, who have extensive training and hands-on experience in their fields of specialty. Additionally, Padre holds a State of California Contractors License, General Engineering A (No. 733481).

Padre's staff has the experience and capabilities to assist the District with a variety of planning and environmental services that are typically required after CEQA filings. Additionally, Padre has the resources, knowledge and experience to effectively assist the District with its future project needs including Capital Improvement permitting. Padre's capabilities include, but not limited to:

- CEQA/NEPA Environmental Documents
- Development Plan Review
- Initial Studies
- Biological and Special-Status Species Surveys/Consultations
- Wetland Delineations
- Biological Assessments and Biological Resource Assessments
- Regulatory Agency Permitting (i.e., Section 404 Section 401, Section 1602, etc.)
- Site Restoration Plans and Revegetation Plans
- Habitat Restoration
- Cultural and Historic Resource Evaluations
- Native American Consultation
- Noise Studies
- Air Pollution Dispersion Modeling and Emission Inventories
- Compliance/Construction Mitigation and Monitoring
- Mitigation Monitoring/ Post-Construction Reporting Programs
- Geologic Hazards Studies
- Lead and Asbestos Surveys

#### **3.2 PROJECT EXPERIENCE**

Padre utilizes a multidisciplinary approach to provide a full spectrum of environmental and permitting services for local and regional projects. Below is a general description of our knowledge and experience. A detailed list of representative project experience is included in Appendix B.

### 3.2.1 Permitting Strategy and Permit Acquisition

Environmental permitting can be complex, time consuming, and frustrating. At Padre, we work proactively with our clients to help make the process as smooth and efficient as possible. We identify the necessary permitting requirements for a given project, establish the appropriate agency contacts, and work with our clients to develop application packages that fulfill agency requirements. We continue to provide support through the final stages of discretionary approval and beyond by providing adjunct services such as construction monitoring. Jurisdictional authorities that we routinely work with include:

Agency	Permits
U.S. Army Corps of Engineers (ACOE)	Section 404 Permits of Clean Water Act, 33 U.S.C. 1344 and Executive Order 11990 and 11998; Section 10 of the Rivers and Harbors Act of 1899, and Section 106 of the National Historic Preservation Act (NHPA).
U.S. Fish and Wildlife Service (USFWS)	Consultation under the Endangered Species Act (16 U.S.C. 1531). Such consultation is typically initiated during the Corps 404 permit process.
National Marine Fisheries Services	Consultation under the Endangered Species Act (16 U.S.C. 1531). Such consultation is typically initiated during the Corps 404 permit process
Bureau of Land Management (B.L.M.)	Land management permit processes with Sundry Notices for oilfield related work and Special Use Permits for various land access activities.
Federal Highway Administration (FHWA)	The FHWA reviews and requires NEPA compliance for all projects it funds. Additionally, FHWA may require geo-environmental assessments for projects. Section 106 of the National Historic Preservation Act (NHPA).
California Coastal Commission (CCC)	Approval authority over California's coast pursuant to the California Coastal Act.
California Geologic Energy Management Division (CalGEM)	Construction review permits and general CEQA documentation.
California State Lands Commission	Approval authority over State sovereign lands - navigable and tidal waterways.
California Department of Fish and Wildlife (CDFW)	Section 1602 Stream Alteration Agreement and California Endangered Species Act (Section 2080-2085).
California Regional Water Quality Control Board (RWQCB)	Permit to discharge water and Water Rights Agreements, water quality certification Clean Water Act (Section 401) as authorized by California Water Code. Approval of Technical Work Plans and Remedial Action Plans associated with assessments and remediation of soil and groundwater impacted by hazardous materials.
California Department of Transportation (Caltrans)	Approval authority over State transportation projects - Caltrans has specific requirements for the preparation of environmental documents, including Natural Environment Studies (NES), Preliminary Environmental Assessment Reports (PEARs), and Initial Site Assessments (ISAs).  Caltrans issues encroachment permits for projects encroaching into State highway rights-of-way.
Local Agencies	Conditional-Use Permits

### 3.2.2 Sensitive Species Compliance Services

Padre provides comprehensive sensitive species compliance services. Padre biologists have extensive experience conducting biological resource surveys, studies, and coordinating projects under the Federal and California Endangered Species Acts.



A summary of these capabilities include:

- Habitat-based and protocol-level surveys for Federal and State-listed species
- Preparation of Biological Assessments
- Formal and informal consultation with State and Federal agencies
- Development of impact avoidance and minimization measures
- Development of mitigation plans to compensate for direct take and habitat loss
- In-field monitoring services and training of crew members in proper avoidance procedures during construction

### 3.2.3 Special Status Species Surveys

Padre biologists have recovery permits allowing handling of listed species, including:

- California red-legged frog;
- Listed vernal pool branchiopods (fairy shrimp and tadpole shrimp);
- Snowy plover; and
- Least Bell's vireo among others.



Other special-status species surveys may include:

- Rare plants;
- California tiger salamander;
- Coast horned lizard;
- Two-striped garter snake;
- Blunt-nosed leopard lizard;
- Burrowing owl;
- Kangaroo rats (various species);
- Bats;
- San Joaquin antelope squirrel; and
- San Joaquin kit fox.

### 3.2.4 Nesting Bird Surveys

Regulatory permits and environmental impact reports typically include requirements to avoid bird nests in compliance with the Fish and Game Code and Migratory Bird Treaty Act. Padre biologists conduct pre-activity surveys during the bird breeding season to identify active nests, based on bird behavior and direct sightings of nests. Activities that may affect bird nests may include excavation, construction of structures and maintenance (primarily along channels). Active nests are typically identified, and a no-work buffer area is established around the nest in coordination with resource agencies. The size of the no-work buffer is typically based on the intensity of the work activity and the sensitivity of the species involved. Active nests may be monitored by Padre staff to determine when the young have fledged, and work may resume near the nest.



### 3.2.5 Wetlands/Waters Regulatory Services

Padre staff is thoroughly versed in regulatory processes associated with obtaining permits from the U.S. Army Corps of Engineers (ACOE) under Section 404 of the Clean Water Act and Section 10 of the River and Harbor Act of 1899. Padre scientists routinely:

- Conduct jurisdictional delineation's of waters and wetlands regulated by the ACOE;
- Prepare permit application packages (including environmental assessments, functions and values analyses, mitigation plans, revegetation plans, 404[b][1] water quality analyses;
- Coordinate pre-application meetings and field inspections with multiple agencies;
- Prepare Section 401 Water Quality Certification/Waste Discharge Requirement permit applications to the Regional Water Quality Control Board (RWQCB);
- Prepare Section 1602 Lake or Streambed Alteration Agreement applications to the California Department of Fish and Wildlife (CDFW); and
- Represent clients during agency meetings and negotiations.

### 3.2.6 Compliance Mitigation Monitoring and Reporting

Padre environmental specialists have prepared and implemented numerous mitigation monitoring and compliance programs. This process starts with the identification of suitable mitigation measures that are written with concise language and precision to allow effective implementation. Once the environmental impact assessment documentation is completed, the mitigation monitoring plan can be prepared. Such plans include guidance on the criteria for implementation, timing of the action, the responsible monitoring parties, reporting requirements and the agencies requiring this reporting.



During project construction and site restoration, Padre can provide comprehensive compliance monitoring and implementation services.

### **3.2.7 Storm Water Pollution Prevention Plans**

Padre provides SWPPP development and monitoring services for construction activities and industrial sites throughout central California. Effective July 1, 2010, construction activities that will disturb more than one acre of land are required to obtain coverage under the 2009 General Permit for Storm Water Discharges Associated with Construction Activities (No. 2009-0009-DWQ) issued by the State Water Resources Control Board. Padre staff have been certified as Qualified SWPPP Developers (QSD) and Qualified SWPPP Practitioners (QSP) under the 2009 General Permit. Padre routinely prepares SWPPPs for industrial sites. Our field technicians are trained in the field protocols for the collection of storm water samples as required for construction and industrial sites. Padre also offers field monitoring and consulting for the implementation of best management practices in compliance with new SWPPP requirements.

### **3.2.8 Archaeological Services**

Padre's archaeological staff is familiar with all aspects of archaeological investigations and research including Phase I archaeological surveys, site identification and documentation, Phase II subsurface testing and evaluation, Phase III data recovery excavations, archaeological construction monitoring, and Native American consultation. Our senior archaeological staff meets the U.S. Secretary of the Interior's Professional Qualifications Standards for archaeology and is a Registered Professional Archaeologist. Additionally, Padre has a laboratory facility in San Luis Obispo for artifact analysis and works with local curation facilities to conserve the artifacts recovered as a part of our field investigations.



### **3.2.9 Other Focused Specialty Studies**

Padre staff members are experienced at conducting focused specialty environmental studies such as geoenvironmental Phase I Environmental Site Assessments, geotechnical/soils reports, air quality and noise studies. These focused studies are conducted by issue-area specialists and are designed to provide comprehensive data concerning potential environmental consequences and potential mitigation

## 4.0 PERSONNEL

Key Padre team personnel have been selected for inclusion in this SOQ based on their experience managing or working on Projects similar to the District's requested services. Ms. Crystahl Taylor will be the assigned Senior Project Manager to serve as the single point of contact for such services. All Padre key personnel identified below are located in our San Luis Obispo and Ventura offices. However, additional staff members from these offices and our Bakersfield and Sacramento offices are available to provide specialized expertise on an as needed basis.

### 4.1 INDIVIDUAL EXPERIENCE/QUALIFICATIONS

The following section provides an overview of individual Padre key personnel and their areas of expertise as it relates to the services requested in the RFP. Detailed resumes are included as Appendix A.

#### PROJECT MANAGEMENT – CEQA/PERMITTING

**Mr. Simon Poulter.** Mr. Poulter will serve as the Principal-in-Charge and will also provide quality control functions during the proposed contract. Mr. Poulter is one of the four founding Principals of Padre and has been working as an environmental consultant for over 34 years. Prior to establishing Padre, he was the program manager for resources management services at Fugro West for six years. Mr. Poulter currently manages Padre's Environmental Sciences Group. In this role, he is responsible for supervising day to day operations of the group including marketing, contract administration, staffing, quality assurance, cost control, and scheduling of ongoing projects. Mr. Poulter's experience includes the preparation of numerous environmental impact reports (EIA/EIR/EIS), resource assessment studies, and environmental training programs for projects within the western United States, as well as several international projects. Mr. Poulter has extensive experience in the San Luis Obispo County including permitting review of the decommissioning of the Diablo Nuclear Generation Station, regulatory support for ongoing restoration at the Guadalupe Dunes Remediation Site and permitting support for the Cayucos Water Treatment Plant. Mr. Poulter has a B.A. in Marine/Aquatic Biology and Physical Geography and an M.R.P. in Environmental Planning.

**Ms. Crystahl Taylor.** Ms. Taylor joined Padre in 2011 and has over 21 years of professional experience as an environmental specialist and manager of environmental projects involving CEQA and NEPA. Ms. Taylor is the manager of the San Luis Obispo's Environmental Sciences Group and would be the point of contact for the District's service needs. Ms. Taylor specializes in the management and preparation of CEQA and NEPA environmental documents. In addition, Ms. Taylor specializes in regulatory agency permitting involving the U.S. Army Corps of Engineers (ACOE), Regional Water Quality Control Board (RWQCB), California Department of Fish and Wildlife (CDFW), United States Fish and Wildlife Service (USFWS), National Marine Fisheries Service, and the California Coastal Commission. Ms. Taylor is experienced in conducting environmental impact analyses and has written various sections for CEQA and NEPA environmental documents. She is also experienced with the management and coordination of projects involving Caltrans Local Assistance such as bridge replacement and road realignment projects. Ms. Taylor has managed and/or contributed to over 15 bridge replacement and road realignment projects within Caltrans, District 5. Ms. Taylor holds a B.S. degree in Natural Resources Management from California Polytechnic State University, San Luis Obispo.



## BIOLOGICAL RESOURCES

**Ms. Alyssa Berry.** Ms. Berry joined Padre Associates in 2010 and has over 16 years of experience monitoring threatened and endangered species in California. Ms. Berry has considerable experience in San Luis Obispo County managing biological monitoring services and permit compliance. As a Senior Biologist, Ms. Berry is responsible for managing the San Luis Obispo office biological staff, biological surveying and reporting, permit compliance monitoring, agency communications, biological resource studies, permit applications, sensitive species surveys, habitat restoration, mitigation monitoring, and project management. Ms. Berry has supported infrastructure projects that required biological monitoring and has overseen environmental compliance monitoring for several projects throughout the Central Coast. She gained valuable experience coordinating the biological monitoring efforts at the recent Marsh Street Bridge Replacement Project, which involved nesting bird pre-construction surveys, nesting deterrent deployment, biological monitoring for sensitive wildlife, and comprehensive permit compliance and reporting. In addition, Ms. Berry specializes in habitat restoration project planning and implementation for wetland, oak woodland, and coastal dune habitat types. Ms. Berry holds a B.A. degree in Earth and Environmental Science from Wesleyan University.

**Ms. Michaela Craighead.** Ms. Craighead joined Padre in 2011 and has over ten years of experience as a field biologist and environmental consultant, with a primary focus on aquatic and marine biology. Currently, Ms. Craighead assists with the preparation of permit applications for Federal and State agencies, as well as CEQA and technical environmental documents. In addition, she conducts biological resource surveys and habitat assessments, including protocol-level surveys for protected species. Ms. Craighead's field experience extends to both onshore and offshore construction projects, as well as numerous remediation and restoration sites. She was approved as a Protected Species Officer (PSO) by the National Oceanic and Atmospheric Administration (NOAA) in 2012 and holds a USFWS 10(A)(1)(a) Recovery Permit for Large Branchiopods. Ms. Craighead holds a B.S. degree in Biology with a concentration in Marine Science and Fisheries from California Polytechnic State University, San Luis Obispo.

**Ms. Christina Santala.** Ms. Santala joined Padre in 2007 and has over 25 years of experience in the environmental field. She is currently a Project Biologist specializing in botanical resources and ecological restoration for projects located throughout the California central coast. Ms. Santala has assisted and managed various types of projects related to residential and commercial development, bridge replacement and improvement, utility pipeline and facilities decommissioning, and oil field exploration and development. Her project specific field work includes oak tree inventory surveys, rare plant presence/absence surveys, vegetation type identification and mapping, aquatic resource delineation surveys, qualitative and quantitative botanical monitoring, habitat restoration plan development and implementation, native seed collection, pre-activity nesting bird and special-status species surveys, and special-status species presence/absence surveys. Other project related tasks include report writing, literature and database searches, data analysis, project planning, and submittal of environmental permit applications to Federal, State, and local agencies including ACOE, CDFW, and RWQCB. Ms. Santala earned a B.S. degree in Biological Sciences from California Polytechnic State University San Luis Obispo, and has attended continuing education classes focused on botany, plant taxonomy, vegetation classification and mapping, soil taxonomy, aquatic resources delineation, and special-status aquatic wildlife.

**Ms. Shannon Gonzalez.** Ms. Gonzalez joined Padre in 2013 and is a Project Biologist with eight years of field and environmental reporting experience. Her responsibilities at Padre include conducting various biological resource surveys and construction monitoring, as well as preparing biological resource survey reports, Federal and State level environmental documents, and other support documents for a range of projects within San Luis Obispo, Monterey, Santa Barbara, Fresno, and Kern counties. Her field experience includes comprehensive biological resource surveys, nesting bird surveys, construction monitoring, burrow excavation, wildlife relocation, oiled wildlife response, and surveys for various federally and/or state-protected wildlife species such as California red-legged frog, blunt-nosed leopard lizard, San Joaquin kit fox, burrowing owl, California tiger salamander, and San Joaquin antelope squirrel. Ms. Gonzalez has a B.S. degree in biological sciences with a concentration in ecology from California Polytechnic State University, San Luis Obispo.

### **CULTURAL RESOURCES**

**Ms. Rachael Letter.** Ms. Letter joined Padre in 2014 and has 17 years of experience as an archaeologist and cultural resource management professional, with more than 12 years in California. Ms. Letter serves as senior archaeologist and project manager for prehistoric and historic archaeological investigations. Ms. Letter's responsibilities include day-to-day project management for all phases of archaeological investigation, background research, Native American consultation, preparing technical reports, assisting with the preparation of environmental documents, and coordinating cultural resource monitors. She frequently directs archaeological pedestrian surveys and testing programs in San Luis Obispo, Santa Barbara, Monterey, Kern, Ventura, Fresno, and San Joaquin counties. Recently, Ms. Letter directed extended Phase I testing in support of the Morro Bay Power Plant Battery Energy Storage System Project and coordinated cultural resource monitors for the Buckley Road Extension of the Avila Ranch Development Project in the City. Ms. Letter holds a B.A. degree in Archaeology from the University of Evansville and a M.S. degree in Industrial Archaeology from Michigan Technological University.

**Mr. Christopher Letter.** Mr. Letter joined Padre in 2014 and has 17 years of experience as an archaeologist and cultural resource management professional, with more than 12 years in California. Mr. Letter serves as a staff archaeologist for prehistoric and historic archaeological investigations. Mr. Letter's responsibilities include completing all phases of archaeological survey and testing, assisting with archaeological records searches and archival research, artifact processing and cataloging, and archaeological monitoring. He frequently conducts Phase I pedestrian surveys and monitors construction projects in San Luis Obispo, Santa Barbara, Kern, Fresno, and Ventura counties. Recently, Mr. Letter completed extended Phase I testing in support of the Morro Bay Power Plant Battery Energy Storage System Project. Mr. Letter holds a B.A. degree in Anthropology from Northern Arizona University.

**Mr. Varick "Val" Kirstine.** Mr. Kirstine joined Padre in 2016 and has 17 years of field experience as an archaeologist the Central and Southern Coast regions of California. He serves as staff archaeologist for prehistoric and historic archaeological investigations. Mr. Kirstine's responsibilities include conducting all phases of archaeological survey and testing, site documentation, background research, artifact analysis and processing, archaeological monitoring, and report and site record preparation. He frequently conducts Phase I pedestrian

surveys and monitors construction projects in San Luis Obispo, Santa Barbara, Kern, Fresno, and Ventura counties. Mr. Kirstine has also completed extended Phase I and Phase II excavations at multiple Early American, Rancho and Mission period sites – including Mission Nuestra Senora de la Soledad, Mission San Buenaventura, and Mission San Miguel.

## **GEOENVIRONMENTAL**

**Mr. Jeff Damron.** Mr. Damron is one of the founding Principals of Padre and has worked in the field of civil and geotechnical engineering for over 34 years. His broad range of experience includes geotechnical engineering, geoenvironmental engineering and remediation, and construction monitoring. He is responsible for the firm's geotechnical practice. Mr. Damron has supervised, managed and performed geotechnical projects throughout California including deep foundation design, landslide stabilization, oil/gas processing facilities, commercial developments, school site improvements, roadways, and pipeline projects including horizontal directional drill projects. He supervises all phases of geotechnical investigations including field exploratory and laboratory testing programs, engineering analyses and evaluations, and report preparation. Mr. Damron manages and develops the design and implementation of erosion control systems for Storm Water Pollution Prevention Plans (SWPPP) under the construction and industrial general permits. He is currently the QSD for a large construction project and is managing the preparation of industrial SWPPPs for multiple sites owned by an industrial client.

**Mr. Louis Cappel.** Mr. Cappel has over 20 years of professional experience as an environmental consultant, and is the Principal manager of the San Luis Obispo's Geoenvironmental Group. Mr. Cappel has been involved primarily in projects relating to the assessment and remediation of soil, soil gas, and groundwater in unconsolidated sediment and bedrock environments. His responsibilities have included performing and overseeing field work, the preparation of technical work plans and reports, risk assessment support, interfacing with State and Federal regulatory agencies, review of work performed by other consultants, and litigation support. Mr. Cappel has also conducted numerous Phase I Environmental Site Assessments at sites located throughout California. Mr. Cappel has managed assessment and/or remediation activities related to a wide variety of contaminants, including petroleum hydrocarbon products, chlorinated solvents, PCBs, metals, naturally-occurring asbestos, nitrate, and pesticides. He has participated in environmental activities at oilfields, Superfund sites, industrial facilities, gasoline service stations, refineries, gas plants, petroleum pipelines, military bases, agricultural properties, residential properties, landfills, and sewage treatment facilities. Mr. Cappel has extensive experience performing and supervising field assessment and remedial activities.

**Mr. Brett Sullivan.** Mr. Sullivan has over 18 years of professional experience as an environmental consultant and has been employed by Padre since 2010. He has been involved primarily in geologic and hydrogeologic assessments related to Subtitle D landfill construction and permitting, assessment and remediation of sites contaminated with petroleum hydrocarbons, heavy metals, chlorinated solvents, and PCBs, Phase I and Phase II Environmental Site Assessments (ESAs) and mineral resource assessments. His responsibilities have included project management, developing technical work plans, site conceptual models, corrective action and site closure plans, supervision of field staff, technical and safety training, remedial construction oversight, analytical laboratory data validation, third party technical review, as well as client, contractor, and regulatory agency engagement. Mr. Sullivan has experience

supervising and directing assessment and remedial activities including environmental drilling, rock coring and logging, soil sample collection and classification, monitoring and remediation well construction, contaminated soil excavations, removal and in-place closure of underground storage tanks, statistical analysis of detection and assessment groundwater monitoring data, groundwater treatment system pilot testing and operation, sub-slab vapor mitigation design, naturally occurring asbestos (NOA) surveys and assessments, geographic information systems and mapping, historical aerial photograph analyses, air monitoring.

### **RESOURCE SPECIALISTS**

**Mr. Robert Vander Weele.** Mr. Vander Weele joined Padre in 2010 and has over 24 years of professional experience as an environmental geologist and environmental consultant. His work experience has been focused on environmental site assessment, remediation, impact assessment, and permitting for private and public-sector clients. Mr. Vander Weele's primary area of environmental impact assessment expertise includes air quality monitoring, air emissions modeling, noise modeling, geologic characterization, and hydrogeological modeling. He is also experienced in the preparation of environmental documentation for NEPA and CEQA. Mr. Vander Weele holds a B.S. degree in Hydrogeology from Western Michigan University, Kalamazoo, Michigan and is a registered professional Geologist in the State of California.

**Ms. Natalie Goetz.** Ms. Goetz joined Padre in 2021 and is a Staff Planner responsible for the preparation of environmental documents such as IS/MNDs, contingency plans and biological assessments. She also works to prepare permit applications with ACOE, RWQCB, and CDFW. Ms. Goetz's experience extends to both onshore and offshore construction projects. Prior to joining Padre, Ms. Goetz's experience consisted of both research-based and rehabilitation/mitigation compliance experience in marine environments. Ms. Goetz is a certified PSO through Marine Protected Species Consulting (MPSC). She holds a B.S. degree in Marine Biology with a minor in Sustainability from San Diego State University and a "CEQA Training" Certification from the University of California, San Diego Extension.

## **5.0 SCOPE OF SERVICES**

Padre provides consulting services to a wide array of clients including: local, State and Federal agencies; special districts (e.g., water, sanitation, waste management and schools); industry; and commercial clients. This diverse background gives Padre ample experience to effectively assist the District with future permitting and environmental services. Padre offers a diverse scope of environmental services with an efficiently streamlined approach to organizing deliverables. Padre's proven approach to deliver quality products and services to our clients is a testament to high-yielding client satisfaction. The moment notice of the requested environmental services is received, an internal system of organized steps is followed to ensure the highest quality deliverable is achieved in a timely manner.

Padre has the time, materials and staffing necessary to fulfill all needs requested by the District within the RFP issued on March 30, 2022. With over 25 years of experience assisting various Districts with numerous projects, Padre has a strong understanding of future environmental compliance services the District will likely request for upcoming projects.

The following sections outline the approach that will be implemented for all of the District's future needs as described in section 2.1 and 2.2 of the RFP.

### **5.1 PERMITTING SUPPORT ON DISTRICT CAPITAL IMPROVEMENT PROJECTS**

Padre has extensive permitting experience and would be a great support to the District's Capital Improvement Projects. Padre routinely secures permits from local, State, and Federal agencies including the following:

- Section 404 Nationwide Permit Authorizations from ACOE;
- Section 401 Water Quality Certifications from RWQCB;
- Section 1602 Lake or Streambed Alteration Agreements from CDFW; and
- Coastal Development Permits from CCC.

### **5.2 REGULATORY AND JURISDICTIONAL AGENCY COORDINATION**

Padre's environmental planners and biologists have close working relationships with local, State, and Federal agencies provided above in Section 5.1. We engage with the agencies throughout project development and during formal and informal consultations pursuant to Section 7 of the Federal Endangered Species Act with the U.S Fish and Wildlife Service and National Marine Fisheries Service.

### **5.3 PROJECT SERVICES FOLLOWING CEQA FILINGS**

Padre provides the full suite of CEQA services, from preparation of the Initial Study through Noticing requirements once the environmental document (i.e., Mitigated Negative Declaration, Environmental Impact Report) have been certified. In addition, Padre can help facilitate preparation of the Mitigation Monitoring Program, and implementation of compliance documentation.

#### **5.4 GRANT APPLICATION AND IMPLEMENTATION SUPPORT**

Padre does not have experience with grant application and implementation support. However, we are able to provide assistance to the District during the grant application process.

## 6.0 PROPOSED FEES

Table 6-1 provides the hourly billing rates for each Padre staff included in this SOQ pursuant to Padre’s 2021 Fee Schedule (Appendix C). The billing rates provided would remain for the initial term of the District’s On-Call Contract.

**Table 6-1. Padre Associates, Inc. Personnel/Rate Sheet**

<b>Padre Staff</b>	<b>Title</b>	<b>Classification</b>	<b>Billing Rate (\$/hr)</b>
Lucas Bannan	Senior GIS Specialist	GIS/CAD Professional	\$110
Alyssa Berry	Senior Biologist	Senior Professional II	\$160
Louis Cappel	Principal	Principal Professional	\$180
Michaela Craighead	Project Biologist	Project Professional	\$120
Jeff Damron	Principal	Principal Professional II	\$210
Natalie Goetz	Staff Planner	Staff Professional	\$95
Shannon Gonzalez	Project Biologist	Project Professional	\$120
Val Kirstine	Staff Archaeologist	Staff Professional	\$95
Christopher Letter	Staff Archaeologist	Staff Professional	\$95
Rachael Letter	Senior Archaeologist/ Project Manager	Senior Professional	\$150
Amy Phelan	Senior AutoCAD Specialist	GIS/CAD Professional	\$110
Simon Poulter	Principal	Principal Professional II	\$210
Christina Santala	Project Biologist	Project Professional	\$120
Brett Sullivan	Senior Geologist	Senior Professional	\$150
Crystahl Taylor	Senior Project Manager	Senior Professional II	\$160
Robert Vander Weele	Project Manager	Project Professional	\$120
Subconsultant Markup			15%

## 7.0 REFERENCES

The following references are for agencies that Padre has provided environmental services for or have existing on-call service contracts with. The provided references know Padre's capabilities and qualifications relevant to the District's future needs.

- County of San Luis Obispo  
Planning and Building Department  
Mr. Steve McMasters  
(805) 781-5096  
smcmasters@so.slo.ca.us
- County of San Luis Obispo  
Public Works Department  
Mr. Keith Miller  
(805) 781-5714  
klmiller@co.slo.ca.us
- Calleguas Municipal Water District  
Mr. Fernando Baez  
(805) 579-7156  
fbaez@calleguas.com
- County of San Luis Obispo  
Public Works Department  
Ms. Kate Ballantyne  
(805) 781-2766  
kballantyne@co.slo.ca.us
- City of San Luis Obispo  
Community Development  
Mr. Dan Van Beveren  
(805) 781-7575  
dvanbeve@slocity.org
- Chevron Environmental Management  
Company  
Mr. Christopher J. Penza  
(661) 392-2371  
cpenza@chevron.com



# **APPENDIX A**

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## **PADRE STAFF RESUMES**

# Simon A. Poulter

Principal, Environmental Sciences Group

**EDUCATION:** M.R.P. Environmental Planning, University of Pennsylvania, 1985

B.A. Marine/Aquatic Biology and Physical Geography, Wittenberg University, 1980

**EXPERIENCE:** Mr. Poulter has over 30 years of experience as a project manager and environmental scientist responsible for the preparation of physical, biological, and cultural resource assessments for inland, coastal, and outer continental shelf projects. Mr. Poulter is a founding Principal of Padre Associates, Inc. and currently manages the firm's Environmental Sciences group. In this role, he is responsible for supervising day to day operations of the group, including marketing, contract administration, staffing, quality assurance, cost control, and scheduling of ongoing projects.

Mr. Poulter has extensive experience with the development of permitting strategies, permit acquisition and permit condition compliance for coastal development and decommissioning projects. He manages the larger coastal permitting projects conducted by Padre and oversees all such projects.

Mr. Poulter also directs the preparation of environmental assessment documentation mandated under both the California Environmental Quality Act (CEQA) and the National Environmental Protection Act (NEPA).

Representative projects Mr. Poulter has actively supervised and participated in include:

**Diablo Canyon Nuclear Power Plant Decommissioning - Permitting Project Management Plan, Avila Beach.** Mr. Poulter served as Padre's Principal-in-Charge for assisting PG&E with the preparation of a Permitting Project Management Plan for the decommissioning of the Diablo Canyon Power Plant. The Permitting Project Management Plan included preparation of a Benchmarking Study, Permitting Conceptual Phasing Report, and a Permitting Strategy Report. Padre also assisted PG&E with the preparation of a comprehensive permitting project schedule and a detailed permitting cost estimate that covered the complete decommissioning of the existing power plant and possible re-use of key site facilities.

**High Energy 3D Offshore Seismic Survey, and Ocean Bottom Seismometer Project, San Luis Obispo County, California.** Mr. Poulter was the project Principal-in-Charge for Environmental Permitting Services for a proposed High Energy 3D Offshore Survey to be conducted offshore of the PG&E Diablo Nuclear Power Generation Station. Project application packages included a Project Description, Biological Assessment, Essential Fish Habitat Assessment, Marine Wildlife Contingency Plan, Section 404 Dredge and Fill Permit, Air Quality Calculation, and Incidental Harassment Authorization. The application packages were sent to jurisdictional agencies including the CSLC, CCC, National Oceanic Atmospheric Administration, National Marine Fisheries Service (NMFS), United States Fish and Wildlife Service (USFWS) and USACOE. Documents prepared by Padre were used by the CSLC in their preparation of an EIR as well as an Incidental

Take Authorization from the NMFS and USFWS. Dates of Service: January 2010 to October 2013.

**Encina Marine Oil Terminal Decommissioning Planning, Carlsbad, California.**

Padre has been providing various forms of project assistance for the proposed decommissioning project. Mr. Poulter is the Principal-in-Charge of Padre's efforts on behalf of the client, Cabrillo Power I LLC. Padre tasks to date have included: preparation of a Project Execution Plan (including numerous supporting plans such as a Marine Wildlife Contingency Plan and Oil Spill Response Plan); coordination with the California State Lands Commission (CSLC) regarding the client's State tidelands lease; assisting the CSLC with the preparation of CEQA compliance documentation for the project; preparation of permit applications (Coastal Development Permit from the California Coastal Commission [CCC], Section 404 Permit from the United States Army Corps of Engineers [USACOE], Section 401 Certification from the Regional Water Quality Control Board [RWQCB] and Right-of-Entry Permit from the California Department of Parks and Recreation); review of contractor bid documentation; and development of mitigation and permit condition tracking documents. Dates of Service: February 2014 to Present.

**ExxonMobil Santa Ynez Unit Offshore Power System Reliability - B (OPSR-B) Phase 2 Project, Santa Barbara County and Offshore, California.**

Padre prepared a Mitigated Negative Declaration on behalf of the CSLC for the project. The project includes the installation and operation of replacement cables and electrical systems from the Las Flores Canyon Processing Facility in Santa Barbara County to Outer Continental Shelf Platforms Harmony and Heritage, and the retrieval of existing out-of-service cables from selected locations within the project area. The CSLC amended the existing State Lease PRC 7163.1, a General Lease - Right-of-Way Use, to allow for project implementation. Dates of Service: April 2013 to October 2016.

**Chevron 4H Platform Decommissioning Project - Shell Mounds Disposition, Offshore California.**

Mr. Poulter has assisted Chevron with the submission of various project application information intended to enable the State Lands Commission and associated responsible agencies to comparatively evaluate the final disposition of the remaining 4H Platform Shell Mounds disposition. These efforts have included extensive biological and geophysical assessment of the remaining mounds as well as a review of a wide range of potential alternatives for both the removal and retention of the mounds. Dates of Service: 1998 to Present.

**PROFESSIONAL  
AFFILIATIONS:**

City of Carpinteria, Former Chairman Planning Commission

Former Chairmen, City of Carpinteria General Plan and Local Coastal Plan Update Committee

National Association of Environmental Professionals - Former Board Member

## Resume

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# Crystahl Taylor

Senior Project Manager

**EDUCATION:** B.S. Natural Resources Management, California Polytechnic State University, San Luis Obispo, 2000. Concentration: Wildlife Biology

**EXPERIENCE:** Ms. Taylor joined Padre Associates in 2011 and has over 21 years of professional experience as an environmental specialist and manager of environmental projects involving the California Environmental Quality Act (CEQA) and the National Environmental Policy Act (NEPA). Ms. Taylor is the manager of the San Luis Obispo's Environmental Sciences Group. Ms. Taylor specializes in the management and preparation of CEQA and NEPA environmental documents. In addition, Ms. Taylor specializes in regulatory agency permitting involving the U.S. Army Corps of Engineers (ACOE), Regional Water Quality Control Board (RWQCB), California Department of Fish and Wildlife (CDFW), United States Fish and Wildlife Service (USFWS), National Marine Fisheries Service (NMFS), and the California Coastal Commission (CCC). She is experienced with the management and coordination of projects involving Caltrans Local Assistance such as bridge replacement and road realignment projects. She is also experienced in permitting and compliance management for coastal and offshore projects involving the California State Lands Commission (CSLC).

Representative projects Ms. Taylor has managed or assisted with include:

**Highway 120 Lodging Hospitality Project, Tuolumne County, California.** Ms. Taylor is currently the Project Manager in support of the Initial Study/Mitigated Negative Declaration for the Highway 120 Lodging Hospitality Project (Project). The Project's development includes 200 guest suite accommodations, lodge, market and bar, pool and pool house, soaking tubs, and an events space located on State Route 120 in the Big Oak Flat area near Groveland, Tuolumne County. Ms. Taylor is also managing the preparation and submittal of the regulatory agency permits required for the Project including a Nationwide Permit from ACOE, a Water Quality Certification from RWQCB, and a Lake or Streambed Alteration Agreement from CDFW.

**Camp Roberts High Water Bridge Project, Camp Roberts, California.** Ms. Taylor is currently the Project Manager in support of the joint NEPA/CEQA environmental document for the Camp Roberts High Water Bridge Project (Project). The Project includes constructing a joint access road and pier foundation repair of the existing High Water Bridge. Padre will prepare the joint environmental document with assistance and review from the California Army National Guard (CA ARNG) environmental staff and the National Guard Bureau (NGB-ILE). Ms. Taylor is also managing the preparation and submittal of the regulatory agency permits required for the Project including a Nationwide Permit from ACOE and a Water Quality Certification from RWQCB.

**City of San Luis Obispo Railroad Safety Trail Project – Taft Street to Pepper Street, San Luis Obispo, California.** Ms. Taylor was the environmental Project Manager for the City of San Luis Obispo Railroad Safety Trail Project. Ms. Taylor managed preparation of the technical studies, as required by Caltrans, for the Project including a Natural Environment Study-Minimal Impact, Section 106 Documentation, Initial Site Assessment, and the Noise Study Report. Ms. Taylor also managed and prepared the Mitigated Negative Declaration for the project.

**Dynegy Morro Bay Power Plant Marine Terminal Decommissioning Project, Morro Bay, California.** Ms. Taylor was the Assistant Project Manager in support of the Morro Bay Power Plant Marine Terminal Decommissioning Project. Ms. Taylor assisted in the revision of the Project Execution Plan for the decommissioning project. She managed the preparation of the Mitigated Negative Declaration for the project in accordance with CEQA on behalf of the CSLC. She also applied for and obtained the CCC Coastal Development Permit, ACOE Nationwide Permit Authorization, RWQCB Water Quality Certification, and the CDFW Operation of Law Letter for pipeline removal.

**East Cat Canyon Oil and Gas Exploration Plan, Santa Barbara County, California.** Ms. Taylor was the Assistant Project Manager in support of an Oil Field Redevelopment Project Plan located in the East Cat Canyon Oil Field, Santa Barbara County, California. Ms. Taylor was the permitting coordinator for various stages of the Project, and coordinated the compilation of permit applications for various resource agencies including the ACOE, RWQCB, CDFW and USFWS. Ms. Taylor also provided assistance through the Environmental Impact Report (EIR) process and assisting in responding to the questions raised by the EIR consultant. In addition, Ms. Taylor assisted with other components of the Project such as agency correspondence, meeting attendance, scheduling, and reporting.

**Chevron San Luis Obispo Tank Farm Remediation and Restoration Project, San Luis Obispo, California.** Ms. Taylor was the Assistant Project Manager in support of the remediation and restoration activities at Chevron's San Luis Obispo Tank Farm property. The project's environmental issues included wetlands, endangered species, rare plants, airport compatibility, historical resources, traffic and transportation, hydrology, recreation, land use compatibility, human and ecological risk mitigation, deed restrictions on future uses, and groundwater quality. Ms. Taylor coordinated with the agencies for the proposed remediation and restoration components of the project and received the following agency permits: Nationwide Permit Authorization from the ACOE, Water Quality Certification from the RWQCB, Streambed Alteration Agreement from CDFW, and Section 7 Biological Opinion from the USFWS and NMFS. In addition, Ms. Taylor assisted with other components of the project such as agency correspondence, meeting attendance, scheduling, and reporting.

**PROFESSIONAL AFFILIATIONS:**

Channel Counties Chapter, Association of Environmental Professionals, member  
Channel Counties Chapter, Association of Environmental Professionals, Board of Directors, Student Membership Chair (2011-2012)

## Resume

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# Alyssa Berry

Senior Biologist

**EDUCATION:** B.A. Earth and Environmental Science, Wesleyan University, 2004.

**EXPERIENCE:** Ms. Berry joined Padre Associates, Inc. in 2010 and has more than 16 years of professional experience in the biological resources field. Ms. Berry currently manages Padre's Biological Group in the San Luis Obispo office and is responsible for organizing biological surveys, permit compliance monitoring, biological resource studies, and restoration project management. Ms. Berry has experience preparing Biological Assessments for projects that have the potential to impact species protected by the Federal Endangered Species Act (FESA). Ms. Berry is qualified to survey for and implement project specific mitigation measures for special-status plant and wildlife species that occur throughout San Luis Obispo County. She effectively communicates with dynamic project teams and works collaboratively to achieve permit compliance.

Representative projects Ms. Berry has worked on include:

**East Cat Canyon Redevelopment Project, Santa Barbara County, California.**

Ms. Berry coordinated and participated in comprehensive biological resource surveys and assessments at a former oil field proposed for redevelopment. Ms. Berry analyzed the survey results to prepare a Biological Assessment that was submitted to the United States Fish and Wildlife Service (USFWS) to address potential impacts to California tiger salamander and California red legged frog (CRLF).

**Marsh Street Bridge Replacement Project, San Luis Obispo County, California.**

Ms. Berry managed the environmental compliance and biological monitoring for the project. Key compliance components included nesting birds, steelhead, CRLF, and regulatory permits (Water Quality Certification and CDFW Streambed Alteration Agreement). She coordinated with the project team managers, trained construction personnel on environmental permit conditions, monitored water quality, conducted pre-activity surveys, monitored installation and removal of the dewatering and diversion system, monitored active nests, and implemented nest deterrence measures. She was approved under the Federal Highways Administration's Federal Aid Program (8-8-10-F-58) Programmatic Biological Opinion) to relocated CRLF. She helped to relocate a juvenile steelhead from the project site during dewatering activities, under the authorization of National Marine Fisheries Service (NMFS) Biological Opinion (BRLS-5016(050)).

**Camp Roberts Programmatic Biological Assessment, San Luis Obispo and Monterey County, California.**

Ms. Berry was awarded the contract to update the Programmatic Biological Assessment of the Camp Roberts military installation's activities. Ms. Berry has prepared the administrative draft that addresses the effects of military activities on four species protected under FESA.

**Guadalupe Restoration Project, San Luis Obispo County, California.** Ms. Berry managed a team of six biologists to comply with over 1,200 ecological permit conditions. Ms. Berry worked closely with regulatory representatives from the County of San Luis Obispo, California Department of Fish and Wildlife (CDFW), USFWS, and California Coastal Commission to achieve project compliance with permit conditions. She adhered to a multi-agency approved Wetland Restoration and Mitigation Plan through planting, photopoint monitoring, and vegetation sampling. Ms. Berry has managed the seed collection, propagation, and replacement planting of three California threatened and endangered plants. Ms. Berry was authorized by the project's Biological Opinion, to handle CRLF, conduct quarterly eyeshine surveys, and perform annual egg mass surveys and to relocate tidewater goby during crayfish trapping activities. Ms. Berry implemented a successful migratory bird monitoring program that enabled construction activities to proceed with minimal disruptions during the nesting season.

**Public Works Railroad Safety Trail, City of San Luis Obispo, California.** Ms. Berry conducted a biological survey of the proposed trail alignment and prepared a Natural Environment Study (Minimal Impacts) for the City of San Luis Obispo and the California Department of Transportation. The biological survey included identification of vegetation types, rare plants, and wildlife habitat.

**San Ardo Energy Project, Monterey County, California.** Ms. Berry managed the biological assessment of an area of the San Ardo oil field. Ms. Berry organized and participated in biological resource surveys that included vegetation type mapping, oak tree inventory, protocol San Joaquin kit fox surveys, and protocol CRLF surveys. She prepared a biological resource survey report, mitigation cost analysis, and species-specific protocol survey reports.

**San Luis Obispo Tank Farm Restoration Project (Project), San Luis Obispo County, California.** Ms. Berry managed biological pre-activity surveys and biological monitoring during remediation and restoration at the Project site. These activities included protocol-level CRLF surveys, nesting bird surveys, and nesting deterrent deployment within the Project site.

**CERTIFICATIONS,  
PERMITS AND  
TRAINING:**

- Wetland Delineation Training, Wetland Training Institute, 2016
- Measuring and Monitoring Plant Populations, California Native Plant Society, 2012
- California Tiger Salamander Workshop, 2009
- CRLF Workshop, 2008
- Coursework in zoology and ornithology, Santa Barbara City College, Spring 2006
- Geology Field Course, University of Pennsylvania, Red Lodge, Montana. June 2003
- Comparative Ecology, School of International Training, Ecuador. Spring 2003

**PROFESSIONAL  
AFFILIATIONS:**

- California Native Plant Society, Member
- Central Coast Wildlife Society, Member

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# Michaela Craighead

Project Biologist

**EDUCATION:** B.S. Biology, California Polytechnic State University, San Luis Obispo, 2009.  
Concentration: Marine Science and Fisheries

**EXPERIENCE:** Ms. Craighead joined Padre in 2011 and has ten years of experience as a field biologist and environmental consultant. Ms. Craighead focus has been primarily in aquatic and marine biology. Ms. Craighead has previously conducted mitigation monitoring of protected terrestrial and marine species, but now her primary focus is preparing permit applications for federal and state agencies, and CEQA documents (Initial Studies and Mitigated Negative Declarations [IS/MND]), technical environmental documents, wildlife contingency plans. In addition, Ms. Craighead conducts biological resource surveys and habitat assessments, including protocol-level for protected species. Ms. Craighead field experience extends to both onshore and offshore construction projects, as well as numerous remediation and restoration sites. In addition, Ms. Craighead was approved as a Protected Species Observer by the National Oceanic and Atmospheric Administration (NOAA) in 2012 and holds a U.S. Fish and Wildlife Service (USFWS) 10(A)(1)(a) Recovery Permit for Large Branchiopods.

Representative projects Ms. Craighead has participated in include:

**Dynegy Morro Bay Power Plant Decommissioning, San Luis Obispo County.** Ms. Craighead responsibilities on the project included marine environmental consulting and marine wildlife monitoring services, and preparing the CEQA document (IS/MND) for the offshore decommissioning of power plant pipelines offshore San Luis Obispo County. Ms. Craighead conducted hydroacoustic sampling of noise levels related to dynamic pipe ramming (DPR) operations and consulted with NMFS for the protection of marine mammals during project activities that produced hazardous noise. Hydroacoustic sampling was conducted with a Reson TC hydrophone, a SpectraDAQ-200 for data acquisition, and the SpectraPlus-SC software. In support of onshore decommissioning activities, Ms. Craighead participated in the relocation of native fish species, including tidewater goby, from the Morro Creek lagoon. Under the supervision of a USFWS-permitted biologist, Ms. Craighead captured and relocated thousands of juvenile and adult tidewater gobies. Dates of service: September 2018 to October 2018.

**Marsh Street Bridge Reconstruction Project, City of San Luis Obispo, California.** Ms. Craighead supported the environmental compliance monitoring for the project and conducted pre-construction nesting bird surveys and nesting raptor monitoring. Ms. Craighead was approved by the United States Fish and Wildlife Service (USFWS) to independently survey for and relocate California red-legged frog prior to and during diversion and dewatering activities. Ms. Craighead also installed block nets and conducted passive relocation of steelhead prior to dewatering activities to avoid significant impacts to federally protected fish. In addition, Ms. Craighead was the biological monitor during bridge demolition and conducted water quality monitoring for the project. Dates of service: February through November 2020.

**Port San Luis Avila Pier Rehabilitation Project, Avila Beach, San Luis Obispo County.** Ms. Craighead prepared the federal Biological Assessment and Essential Fish Habitat Assessment to support federal permit applications for the project. In addition, due to the repair and maintenance nature of the project, Ms. Craighead prepared the Notice of CEQA exemption. Dates of Service: February 2017 through Present.



**San Luis Obispo Tank Farm Remediation, Restoration, and Development Project, San Luis Obispo County, California.** In support of the Biological Assessment for the project, Ms. Craighead participated in several protocol-level surveys for both state and federally protected species including, California Red-legged frog (*Rana draytonii*), burrowing owl (*Athene cunicularia hypugaea*), and large vernal pool branchiopods (*Branchinecta* sp., *Streptocephalus woottoni*, *Lepidurus packardi*). In addition, Ms. Craighead managed the Surface Hydrocarbon Inspection and Monitoring Program for two years which consisted of weekly surveys for oiled wildlife, and if found, the rescue and recovery of oiled wildlife under the guidance of the California Department of Fish and Wildlife (CDFW). As the USFWS-approved biologist, Ms. Craighead oversees the construction of vernal pool fairy shrimp (*Branchinecta lynchi*) restoration habitat and conducts wet season monitoring surveys. Dates of service: December 2013 through Present.

**California Resources Petroleum Corporation Grubb Lease Decommissioning, Ventura County, California.** Ms. Craighead completed marine SCUBA biological resources surveys of intake and outfall pipelines proposed for removal. Ms. Craighead documented the type and location of marine plants, macro-epifauna, and fish associated with the habitats within the project area to avoid impacts to these habitats. In addition, Ms. Craighead helped prepare the project's CEQA document (IS/MND) and technical documents to support federal and state permit applications. Dates of service: November 2018 to March 2020.

**CERTIFICATIONS,  
PERMITS AND  
TRAINING:**

USFWS Section 10(A)(1)(a) recovery permit for federally listed branchiopods (fairy shrimp and tadpole shrimp (Permit No. TE-13636B-1)

American Academy of Underwater Sciences Scientific Diver and National Association of Underwater Instructors Master SCUBA Diver, 2015.

eDNA: A Practical Workshop, presented by the Western Section of the Wildlife Society, Genidaqs, and WRA. 2019.

Divers Alert Network CPR/AED and First Aid and Emergency Oxygen Administration for Diving Accidents Certified, 2019.

Standards of Training Certifications and Watchkeeping Certified Personal Survival Techniques, Cal Maritime Academy, 2018.

California Red-Legged Frog Workshop, presented by Trish Tartarian, 2014. Western Burrowing Owl Workshop, presented by Dr. Lynn Trulio, 2014.

Fairy Shrimp of California Identification Course, presented by Mary S. Belk, 2013.

**PROFESSIONAL  
AFFILIATIONS:**

California Central Coast Chapter of the Wildlife Society, member

## Resume

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# Christina Santala

Project Biologist

**EDUCATION:** B.S. Biological Sciences, California Polytechnic State University, San Luis Obispo, 1988.

**EXPERIENCE:** Ms. Santala joined Padre Associates, Inc. in April 2007 and has over 25 years of experience in the environmental field. Ms. Santala specializes in botany and ecological restoration of upland, riparian, and wetland habitats associated with utility pipeline and facilities decommissioning, oil field exploration, development, and remediation, bridge replacement and improvement, residential development, and streambed alteration projects. In addition, Ms. Santala is experienced in conducting aquatic resources delineations and jurisdictional determinations in accordance with the United States Army Corps of Engineers (ACOE) guidelines.

Representative projects Ms. Santala has managed and assisted with include:

**San Luis Obispo Tank Farm Remediation and Restoration Project, San Luis Obispo County, California.** Ms. Santala was involved with this soil remediation and habitat restoration project for over ten years and served as lead restoration ecologist for initial restoration activities. Ms. Santala assisted with and managed baseline botanical inventory surveys, rare plant surveys and mapping, vegetation type identification and mapping, rare plant seed collection, planting and seeding, noxious/invasive plant management, temporary irrigation system design, restoration plan development, design, and implementation, and restoration monitoring.

**Cuyama River Tanker Spill Restoration Project, Santa Barbara and San Luis Obispo Counties, California.** Ms. Santala conducted biological baseline surveys and developed and implemented the habitat restoration and mitigation plan. Specific tasks included rare plant and botanical inventory surveys, vegetation classification and mapping, development of mitigation strategies and restoration performance criteria focused on establishment of riparian habitat, vegetation rapid assessment protocol surveys, report writing, and is currently involved with restoration site monitoring and adaptive management.

**Air Park Drive Bridge Replacement Project, San Luis Obispo County, California.** Ms. Santala assisted with the botanical component of this bridge replacement project located in the community of Oceano, San Luis Obispo County, California. Specific tasks included an aquatic resources delineation survey following ACOE guidelines, botanical inventory, vegetation type assessment and mapping, jurisdictional, and associated research and reporting.

**Highway 120 Lodging Project, Tuolumne County, California.** Ms. Santala completed the biological technical reports used for CEQA documentation in support of the environmental permitting for this development project. Specific tasks included biological resources assessment field survey, aquatic resources delineation survey, and oak tree inventory and all associated reporting, and preparation of technical responses during the CEQA review period.

## Resume

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**Various Residential Biological Survey Assessments, San Luis Obispo County, California.** Ms. Santala has completed numerous biological resources assessment surveys for small residential development projects to document the existing biological resources and to determine the for potential special-status plants and wildlife to occur within the subject properties. Specific tasks included desktop review and database research, field surveys, use of Global Positioning System unit for mapping, report writing including preparation of avoidance and minimization and mitigation measures to protect special-status resources.

**U.S. Highway 101 Clark Avenue and Northbound Interchange Improvement Project, Santa Barbara County, California.** Ms. Santala managed and assisted with the environmental permit compliance and onsite biological monitoring for the project, which involved removal and construction of highway interchange ramps. Activities completed included pre-project habitat assessment and special-status wildlife surveys, pre-activity surveys of habitat areas prior to initial ground disturbances, periodic biological monitoring, and associated reporting. Onsite monitoring focused on potentially occurring special-status wildlife species including American badger, silvery legless lizard, coast horned lizard, and nesting birds.

**East Cat Canyon Oil and Gas Exploration Project, Santa Barbara County, California.** Ms. Santala completed numerous field surveys and desktop analyses for this oil and gas exploration project. Specific tasks included wetland delineation and jurisdictional determinations, site-wide botanical inventory, California Native Plant Society (CNPS)/California Department of Fish and Wildlife (CDFW) vegetation rapid assessment protocol surveys, vegetation mapping, rare plant surveys, oak tree inventory, restoration plan and oak tree replacement plan development, and associated reporting and permitting assistance.

**CERTIFICATIONS,  
PERMITS AND  
TRAINING:**

CDFW Plant Voucher Collecting Permit 2081(a)-21-016-V.

Rare Pond Species Survey Techniques Workshop (California red-legged frog, California tiger salamander and southwestern pond turtle), Laguna de Santa Rosa Foundation, 2008.

Flowering Plant Families Workshop, Jepson Herbarium, 2010.

Manual of California Vegetation Second Edition Workshop, California Native Plant Society, 2012.

Soil Morphology and Hydric Soils Workshop, California Native Plant Society, 2015.

Wetland Delineation Workshop, Jepson Herbarium, 2015.

**PROFESSIONAL  
AFFILIATIONS:**

California Native Plant Society, member.

Robert F. Hoover Herbarium, California Polytechnic State University; volunteer.

# Shannon Gonzalez

Project Biologist

**EDUCATION:** B.S. Biological Sciences, California Polytechnic State University, San Luis Obispo, 2013. Concentration: Ecology

**EXPERIENCE:** Ms. Gonzalez joined Padre Associates, Inc. in 2013 and has eight years of experience as a field biologist. She is responsible for conducting biological resource surveys and environmental/construction monitoring, and for the preparation of biological resources reports, environmental permit applications, and support documents for a range of projects within San Luis Obispo, Santa Barbara, Monterey, Kern, and Fresno Counties. Her field experience includes comprehensive biological resource surveys, nesting bird surveys, construction monitoring, burrow excavation, wildlife relocation, oiled wildlife response, and surveys for various federally and/or state-protected wildlife species such as California red-legged frog (CRLF), blunt-nosed leopard lizard (BNLL), San Joaquin kit fox (SJKF), burrowing owl, California tiger salamander (CTS), and San Joaquin antelope squirrel.

Representative projects Ms. Gonzalez has participated in include:

**County of San Luis Obispo Environmental Monitoring for the Oak Shores Development Project (January – July 2021).** Ms. Gonzalez provided compliance monitoring for the Oak Shores project site to ensure that all applicable environmental mitigation measures from the County’s conditions of approval were implemented throughout the project duration. She completed the initial site walk with project engineers and contractors prior to start of 2021 work activities to discuss environmental concerns and solutions, and regularly coordinated with project engineers as work progressed at the site.

**Chevron North America Exploration and Production, San Ardo Oil Field Salinas River Vegetation Maintenance Project, Monterey County (2018-2021).** Ms. Gonzalez conducted construction monitoring and annual eagle roosting surveys along the Salinas River in support of regular vegetation maintenance, and completed the associated documentation and reports in accordance with the project’s CDFW Streambed Alteration Agreement. Over the past four years, Ms. Gonzalez has identified juvenile and adult bald eagle, red-tail hawk, northern harrier, and osprey during surveys and monitoring at the site.

**Chevron Environmental Management Company, San Luis Obispo Tank Farm Remediation and Restoration Project, San Luis Obispo County (2014 – 2018).** Ms. Gonzalez conducted construction monitoring over four years for remediation activities at the project site. In addition, she participated in annual pre-activity surveys which were focused on California red-legged frog (CRLF), burrowing owl, nesting birds, raptors, and special-status plants. Ms. Gonzalez also observed and documented the activity of several nesting birds and numerous raptors during surveys and monitoring at the site, including but not limited to burrowing owl, golden eagle, bald eagle, white-tailed kite, and northern harrier.

**Dynegy; Morro Bay Power Plant Decommissioning Project – San Luis Obispo County (September – November 2018).** Ms. Gonzalez conducted onshore environmental monitoring for power plant pipeline abandonment and removal

activities in Morro Bay, California. Monitoring included continuous communication with work crews to avoid and/or minimize impacts to surrounding sensitive resources including the Pacific Ocean, dune scrub/beach habitat, and Morro Creek. In support of onshore pipeline removal, Ms. Gonzalez assisted with tidewater goby pre-activity surveys and native fish relocation, including tidewater goby, within Morro Creek under the supervision of a USFWS-approved biologist.

**Chevron North America Exploration and Production San Ardo Oil Field Biological Constraints Analysis, Monterey County (2016).** In support of the project biological resources analysis, Ms. Gonzalez participated in USFWS protocol-level surveys for CRLF along a four-mile stretch of the Salinas River within the San Ardo Oil Field. No CRLF were observed during these surveys; however, Ms. Gonzalez observed and/or heard several amphibian and reptile species during this time, including western spadefoot, Sierran treefrog, American bullfrog, and southwestern pond turtle. Ms. Gonzalez handled one western spadefoot toad during CRLF surveys for this project.

**Chevron Environmental Management Company, Chevron North American Exploration and Production, and Seneca Resources Corporation; various projects – Kern, Kings, and Fresno Counties, California (2014 – present).** Ms. Gonzalez has assisted with seven years of protocol-level blunt-nosed leopard lizard (BNLL) surveys for various projects within Kern, Kings, and Fresno Counties and has led surveys as a Level II BNLL surveyor since 2018. During these surveys, Ms. Gonzalez has observed several reptile species including but not limited to BNLL, western side-blotched lizard, California whiptail, San Joaquin coachwhip, northern Pacific rattlesnake, and Pacific gophersnake. Other wildlife observed incidentally but regularly during surveys include San Joaquin kit fox, burrowing owl, and Swainson's hawk.

**AERA Energy, LLC; East Cat Canyon Oil Field Redevelopment Project – Santa Barbara County, California (2014 – 2017).** Ms. Gonzalez participated in California tiger salamander (CTS) upland habitat and aquatic surveys for this project for three years and identified and/or handled several common amphibians and reptiles during that time, including, but not limited to, western spadefoot, western toad, Baja California treefrog, black-bellied slender salamander, western side-blotched lizard, and Skilton's skink.

**TRAINING:** Western Burrowing Owl Workshop, Elkhorn Slough Coastal Training Program, 2014  
California Tiger Salamander Workshop, Elkhorn Slough Coastal Training Program, 2015  
San Luis Obispo (SLO) County Biological Report Guidelines Workshop, County of SLO Planning Department, 2015  
San Joaquin Kit Fox Workshop, California Central Coast Chapter of the Wildlife Society, 2016  
Blunt-Nosed Leopard Lizard Workshop, San Joaquin Valley Chapter of the Wildlife Society, 2018  
Rattlesnake Safety Workshop, Central Coast Snake Services, 2020

**PROFESSIONAL AFFILIATIONS:** California Central Coast Chapter and San Joaquin Valley Chapter of the Wildlife Society, member

# Rachael J. Letter, RPA

Senior Archaeologist/Project Manager

**EDUCATION:** M.S. Industrial Archaeology, Michigan Technological University, 2005.  
B.A. Archaeology, University of Evansville, 2003.

**REGISTRATIONS:** Registered Professional Archaeologist (ID# 989275)

**EXPERIENCE:** Ms. Letter has 16 years of experience as an archaeologist and cultural resource management professional, with more than eleven years in the state of California. She joined Padre Associates, Inc. (Padre) in 2014 and serves as senior archaeologist and project manager for prehistoric and historic archaeological investigations. Ms. Letter’s responsibilities include day-to-day project management for all phases of archaeological survey and testing, completing archaeological records searches and archival research, Native American consultation and coordination, and preparing technical reports and site records. Ms. Letter has directed and conducted archaeological projects in San Luis Obispo, Santa Barbara, Ventura, Monterey, Kern, Los Angeles, Fresno, and San Joaquin counties.

Representative archaeological projects she has managed include:

**Santa Rosa Creek Road Repair and Alignment, Cambria.** Ms. Letter acted as Senior Archaeologist for this Project, which included repairs and a realignment of a portion of Santa Rosa Creek Road that was washed-out during the 2016 rainy season. A records search completed at the Central Coast Information Center, identified one prehistoric habitation site within the southwest corner of the Project site. Ms. Letter directed the Phase I pedestrian survey, which relocated the prehistoric habitation site and significantly expanded the site’s boundaries to the north and east. She then reported the records search and survey results in a technical report to the County and recommended Phase II subsurface testing and evaluation within the portions of the Project that will impact the archaeological site.

**Archaeological Monitoring, Avila Ranch Development Project, City of San Luis Obispo.** Ms. Letter is currently Senior Archaeologist and coordinates archaeological and tribal monitors in support of the Avila Ranch Development Project in the southern part of the City of San Luis Obispo. In compliance with the mitigation measures included in the Project Environmental Impact Report, one Padre archaeologist and one member of the local Chumash tribe monitor all Project-related ground disturbance for the presence of significant cultural materials and features. Prior to ground disturbance, the Padre archaeologist provides cultural resource awareness training for all construction personnel. Once all ground disturbance is complete, Ms. Letter will prepare a cultural resource completion report summarizing all encountered finds. Cultural concerns associated with this project have required frequent communication with the *yak tit’u tit’u* Northern Chumash tribe.

**Extended Phase I Testing, Morro Bay Power Battery Energy Storage System Project, Morro Bay.** At the request of EMC Planning Group, Inc., on behalf of the Morro Bay Power Company, Padre completed extended Phase I archaeological

testing in support of the Morro Bay Power Plant Battery Energy Storage System Project. Ms. Letter acted as Senior Archaeologist and directed geoprobe testing to better determine whether intact subsurface cultural deposits related to previously recorded cultural resources were present within the Project site. Using soil borings and geoarchaeological analysis, Padre identified five areas of cultural sensitivity that indicated the presence of prehistoric habitation and cooking areas. Ms. Letter summarized the results in a technical report and concluded that the five cultural areas have the potential to yield important information about California prehistory. The recommended mitigation measures included Project redesign or data recovery excavations if redesign was not feasible.

**Archaeological Monitoring, Morro Bay Power Plant Marine Terminal Decommissioning Project, Morro Bay.** At the request of Associated Pacific Constructors, Inc., on behalf of Dynegy Morro Bay, LLC, Padre provided cultural resources monitoring in accordance with mitigation measures from the Dynegy Morro Bay Power Plant Marine Terminal Decommissioning Project Mitigated Negative Declaration and the California Coastal Commission Coastal Development Permit. For this project, Ms. Letter acted as Senior Archaeologist, coordinating with Native American tribal representatives and directing cultural resource monitoring. Cultural resource monitoring was conducted under a Cultural Resources Monitoring and Treatment Plan prepared by Padre, which allowed for the identification, evaluation, treatment, and protection of cultural resources that may be affected by ground disturbing activities as specified by the Project MND. Ms. Letter later authored a technical report documenting the results of the cultural resources monitoring for submittal to the client and the county.

**Railroad Safety Trail – Taft to Pepper, City of San Luis Obispo.** On behalf of the City of San Luis Obispo Public Work Department, Ms. Letter acted as Senior Archaeologist for the extension of the Railroad Safety Trail from its current terminus at Taft Street to Pepper Street in the City of San Luis Obispo. Ms. Letter consulted with the Caltrans District 5 archaeologist to define the Project APE and conducted the Phase I pedestrian survey. She also reviewed the records search results and consulted with local Native American tribes about the Project. Once completed, she reported all findings in the ASR and HPSR and assisted the City with AB 52 consultation.

**Bonita School Road Bridge Replacement, Santa Barbara and San Luis Obispo Counties.** Ms. Letter acted as Senior Archaeologist for the replacement of the Bonita School Road bridge that spans between Santa Barbara and San Luis Obispo counties. Ms. Letter completed the records search, which did not identify any cultural resources within the Project site and directed the Phase I pedestrian survey. She consulted with the Caltrans District 5 archaeologist and County engineer to define the Project APE and prepared the necessary ASR and HPSR.

## Varick “Val” Kirstine

Staff Archaeologist

**EDUCATION:** Moorpark College, Cuesta College, Enrolling at Oregon State University, 2022.

**EXPERIENCE:** Mr. Kirstine has 17 years of field experience as an archaeologist in the Central and Southern Coast regions of California. At Padre, Mr. Kirstine works from the San Luis Obispo office as a staff archaeologist for prehistoric and historic archaeological investigations. His responsibilities include conducting all phases of archaeological survey and testing, site documentation, background research, artifact analysis and processing, archaeological monitoring, and report and site record preparation. He frequently conducts Phase I pedestrian surveys and monitors construction projects in San Luis Obispo, Santa Barbara, Kern, Fresno, and Ventura counties. Recently, Mr. Kirstine served as lead archaeological monitor for the Morro Bay Power Plant Marine Terminal Decommissioning Project and the Guadalupe Restoration Project in San Luis Obispo County.

Representative projects Mr. Kirstine has worked on include:

**Morro Bay Power Plant Battery Storage Project, California.** Mr. Kirstine completed archaeological testing in coordination with OEC and local Chumash tribal monitors. He also monitored and directed geoprobe activity as needed, generated soil assessment logs during core extraction, and obtained soil samples for laboratory analysis. Mr. Kirstine later co-authored the report for submittal to the County and client.

**Phase I Archaeological Survey, Jack and Laura Dangermond Preserve, The Nature Conservancy, Santa Barbara County, California.** Mr. Kirstine acted as Staff Archaeologist and assisted in the completion of a large Phase I archaeological survey of multiple locations throughout the preserve. He conducted an intensive pedestrian survey of the Project area that identified several prehistoric resources. Mr. Kirstine documented the resources and later assisted with report and site record preparation.

**RTA Harbor Terrace, LLC, Avila Beach, California.** Mr. Kirstine completed extensive archaeological testing and long-term archaeological monitoring in support of a large commercial development project at a highly sensitive and significant prehistoric site in Avila Beach. This Project required close coordination with Chumash tribal monitors and, later, with a large team of archaeologists from Applied Earthworks, Inc. Primary duties included the excavation of several data recovery units, water-assisted artifact screening, completion of soil profiles, documentation of artifacts, the direction of heavy equipment, and the recovery of human remains.

**Firestone Walker Brewery Solar Photovoltaic System, Paso Robles, California.** Mr. Kirstine served as lead archaeological monitor during construction activity, in collaboration with Salinan tribal monitors. Over the



course of this project, he recorded several prehistoric isolates and later co-authored a report summarizing results of monitoring activities.

**Laguna County Sanitation District Wastewater Reclamation Plant Facilities Master Plan, Santa Barbara County, California.** Mr. Kirstine acted as Staff Archaeologist for improvements of the Laguna County Sanitation District in northern Santa Barbara County. He conducted an intensive pedestrian survey of the Project area that identified four prehistoric sites, including one large habitation site. Mr. Kirstine documented the resources and assisted with report and site record preparation. Mr. Kirstine also served as lead archaeological monitor during subsequent geotechnical testing.

**Venadito Canyon Culvert Repair and Replacement Project, Santa Barbara County, California.** Mr. Kirstine served as Staff Archaeologist and lead archaeological monitor for this project, which required close collaboration with a local Chumash monitor. Over the course of several months of construction monitoring, Mr. Kirstine recorded several new historic sites related to late 19<sup>th</sup> to early 20<sup>th</sup> century ranching and agriculture. He later co-authored the report. Wildfire and subsequent winter storms during the 2016 rainy season severely damaged a culvert bridge crossing on Exxon-managed roadway near La Paloma Ranch. Efforts to replace the damaged crossing and install a new box culvert required extensive archaeological monitoring for all ground-disturbing activities.

**Morro Bay Power Plant Marine Terminal Decommissioning Project, San Luis Obispo County, California.** Mr. Kirstine acted as Staff Archaeologist and as lead archaeological monitor. He provided cultural resource awareness training for construction personnel and monitored ground disturbing activities. As lead archaeological monitor, he managed the day-to-day schedule for the Project, which involved coordination with the yak tit'yu tit'yu yak tilhini Northern Chumash Tribe, the Northern Chumash Tribal Council, and the Xolon Salinan Tribe. Mr. Kirstine recorded several prehistoric isolates and updated records for one previously recorded prehistoric habitation site. Upon completion of field work, Mr. Kirstine co-authored the report.

**Guadalupe Restoration Project, San Luis Obispo County, California.** Mr. Kirstine acted as Staff Archaeologist and lead archaeological monitor for an oil field remediation in southern San Luis Obispo County. He provided cultural resource awareness training for construction personnel, conducted Phase I pedestrian surveys and status checks of known sites, site documentation, and long-term construction monitoring. As lead archaeological monitor, Mr. Kirstine managed the day-to-day schedule for the Project, completed daily monitoring logs, and monthly progress reports. Increased cultural concerns associated with this Project have required frequent communication with the yak tit'yu tit'yu yak tilhini Northern Chumash Tribe.

## PERMITS:

**BLM CRUP CA-18-03, Field Director**

# Jeffrey T. Damron, P.E., G.E.

Principal

**EDUCATION:** B.S. Civil Engineering, California Polytechnic State University, San Luis Obispo, 1984

**REGISTRATIONS:** Professional Geotechnical Engineer, California  
Professional Civil Engineer, California  
Qualified SWPPP Developer/Practitioner (QSD/QSP) No. 01041

**EXPERIENCE:** Mr. Damron is one of the founding partners of Padre Associates, Inc. and has worked in the field of civil and geotechnical engineering for over 34 years. His broad range of experience includes geotechnical engineering, geoenvironmental engineering and remediation, and construction monitoring. He is responsible for the firm's geotechnical practice.

Mr. Damron has supervised, managed and performed geotechnical projects throughout California including deep foundation design, landslide stabilization, oil/gas processing facilities, commercial developments, school site improvements, roadways, and pipeline projects including horizontal directional drill (HDD) projects. He supervises all phases of geotechnical investigations including field exploratory and laboratory testing programs, engineering analyses and evaluations, and report preparation. Mr. Damron manages and develops the design and implementation of erosion control systems for Storm Water Pollution Prevention Plans (SWPPP) under the construction and industrial general permits. He is currently the QSD for a large construction project and is managing the preparation of industrial SWPPPs for multiple sites owned by an industrial client.

From 1988 through 1991, Mr. Damron served as the Project Soils Engineer for the Exxon Santa Ynez Unit Expansion Project's onshore facilities, onshore pipelines, and nearshore pipelines in Santa Barbara County, California. As Project Soils Engineer, he was the onsite engineer responsible for geotechnical engineering, construction monitoring, and coordination of surveying and construction materials testing for the site and facility development portion of this oil processing and storage facility. Construction monitoring activities included observation and testing of reinforced earth walls, tieback walls, soil-cement production and placement, geogrid reinforced engineered fill, drilled pier construction, and reinforced concrete placement inspection/testing.

Representative projects that Mr. Damron has completed include:

**Parking Lot 6, Santa Barbara, California.** Provided geotechnical study services in support of the design of a proposed parking structure to be constructed at the City of Santa Barbara's Parking Lot No. 6. The proposed 6 story structure includes 2 subterranean levels that extend up to 30 feet below existing grade. An extensive geotechnical study included the advancement of CPT soundings and hollow-stem auger drill holes to depths up to 70 feet below existing grade. Padre evaluated bearing capacity and estimated settlement for foundation loads of up to

1,000 kips in developing recommendations for foundation design.

**Estero Bay Telecommunications Project San Luis Obispo County, California.** Evaluated geotechnical conditions along a proposed telecommunications cable alignment and at a proposed consolidated communications center site at the Estero Bay Marine Terminal Facility. Developed subsurface exploration and laboratory program for the proposed cable alignment and communication center to evaluate subsurface geological and geotechnical conditions.

**Ojai Valley Inn, Ojai, California.** For over 15 years has provided geotechnical services for the design and construction of several expansion projects at the Ojai Valley Inn property. Projects have included 1- to 3-story hotel buildings, a large conference/entertainment facility, swimming pools and upgrades/additions to existing buildings. Work has included geotechnical study services to provide recommendations for project design, construction observation/testing and geotechnical consultation to assist in the successful completion of multiple projects.

**Cabrillo Business Center, Goleta, California.** Performed several geotechnical studies for multiple phases of commercial development including two-story office/retail buildings, distribution warehouse, self-storage facilities and infrastructure improvements. Exploration programs have utilized cone penetrometer test soundings and drill holes. Site improvements required surcharge loading of building pads and Geopier foundations. Provided construction observation and testing services during all earthwork activities.

**Pittsburg PIM Pipeline Project, Pittsburg, California.** Provided a design-level geotechnical study for the replacement of an approximate 4,000-foot section of pipeline adjacent to Suisun Bay. Scope of work included exploration of subsurface conditions using Cone Penetration Test (CPT) soundings, rotary mud drilling techniques, and collection of relatively undisturbed soil samples using push Shelby tubes, standard penetration and modified California split-spoon samplers. Drill holes were advanced to depths of 140 to 150 feet below grade. Analyses developed geotechnical recommendations for construction of the pipeline segment using horizontal directional drilling (HDD) techniques including an evaluation of potential frac-out in area of very shallow ground water conditions.

**CERTIFICATIONS,  
PERMITS AND  
TRAINING:**

- Introduction to Professional Practice, Institute for Professional Practice, 1991
- Short-Courses: Clay Liners, Covers for Waste Disposal Facilities, University of Texas, Austin, 1991
- Evaluation and Mitigation of Earthquake-Induced Liquefaction Hazards, University of Southern California, 1991
- Seismic Design of Waterfront Retaining Structures, United States Army Corps of Engineers, 1993

**PROFESSIONAL  
AFFILIATIONS:**

American Society of Civil Engineers, Member

## Resume

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# Louis Cappel, P.G., C.Hg.

Principal Geologist

**EDUCATION:** B.S. Soil Science - Land Resources, California Polytechnic State University, San Luis Obispo, California, 1999

M.A. Industrial and Technical Studies, California Polytechnic State University, San Luis Obispo, California, 2000

Coursework in Hydrology, University of Idaho, Moscow, Idaho, 2003

**REGISTRATIONS:** Professional Geologist, California, No. 8344

Certified Hydrogeologist, California, No. 911

Registered Geologist, Arizona, No. 45425

Certified Professional Soil Scientist (ARCPAC) No. 35519 (Inactive)

**EXPERIENCE:** Mr. Cappel has over 20 years of professional experience as an environmental consultant. He has been involved primarily in projects relating to the assessment and remediation of soil, soil gas, and groundwater in unconsolidated sediment and bedrock environments. His responsibilities have included performing and overseeing field work, the preparation of technical work plans and reports, risk assessment support, interfacing with state and federal regulatory agencies, review of work performed by other consultants, and litigation support. Mr. Cappel has also conducted numerous Phase I Environmental Site Assessments at sites located throughout California.

Mr. Cappel has managed assessment and/or remediation activities related to a wide variety of contaminants, including petroleum hydrocarbon products, chlorinated solvents, PCBs, metals, naturally-occurring asbestos, nitrate, and pesticides. He has participated in environmental activities at oilfields, Superfund sites, industrial facilities, gasoline service stations, refineries, gas plants, petroleum pipelines, military bases, agricultural properties, residential properties, landfills, and sewage treatment facilities. Mr. Cappel has extensive experience performing and supervising field assessment and remedial activities.

Representative projects that Mr. Cappel has completed include:

**Chevron, Multiple Sites, San Joaquin Valley, California.** Managed the assessment and remediation of PCBs in soil and concrete at active and inactive oilfield facilities. All work was performed under the oversight of the U.S. EPA Region 9 using the *PCB Facility Approval Streamlining Toolbox (FAST): Streamlining the Cleanup Approval Process*.

**Chevron, Naval Petroleum Reserve No. 1, Elk Hills Oilfield, Kern County, CA.** Performed technical review of assessment and remediation plans, and implementation reports prepared by the Department of Energy's consultant as part of ongoing oilfield restoration activities. The lead regulatory agencies are DTSC and Central Valley RWQCB.

## Resume

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**Confidential Client.** Managed the assessment and remediation of mercury and petroleum hydrocarbons in soils at a former roadmix facility. A total of approximately 100,000 cubic yards of impacted soils were excavated and disposed of off-site.

**Chevron, Rambler Well Abandonment, Kern River Oilfield, Kern County, CA.** Managed the assessment of soils surrounding a former oil well location. Assisted with the well abandonment and closure reporting with oversight provided by the Central Valley RWQCB and CalGEM.

**Chevron, Surface Impoundment Closure Projects, Coalinga Oilfield, Fresno County, CA.** Managed the soil assessment and soil remediation at former oilfield surface impoundments with regulatory oversight provided by the Central Valley RWQCB.

**Chevron, Santa Maria Valley Sump Projects, Santa Maria Oilfield, Santa Barbara County, CA.** Managed the assessment and remediation of numerous residential, industrial, and agricultural properties affected by historical oilfield activities with regulatory oversight provided by the County of Santa Barbara Environmental Health and Central Coast RWQCB.

**Chevron, Former Avila Terminal, Avila Beach, San Luis Obispo County, CA.** Managed the operations, and compliance monitoring and reporting at Unocal's former 95-acre facility including: Industrial SWPPP implementation and monitoring; groundwater, cliff springs, and intertidal zone monitoring; and dual-phase extraction system operation and monitoring. Regulatory oversight was provided by the Central Coast RWQCB.

**ConocoPhillips, Central Valley and Coastal, CA.** Managed soil and groundwater assessment and remediation activities at numerous bulk fueling terminals, crude oil pipelines, and pump stations located throughout California with regulatory oversight provided by various county health agencies and RWQCBs.

**CERTIFICATIONS,  
PERMITS AND  
TRAINING:**

California Division of Occupational Health and Safety (DOSH) 40-Hour Health and Safety Training and Annual Refresher.

DOSH, Annual Health and Safety Training Refresher Course (annually).

CAL-OSHA Competent Person for Excavations, Trenches, and Earthwork

## Resume

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# Brett D. Sullivan, P.G.

Project Geologist

**EDUCATION:** B.A. Earth Science, Iowa State University, Ames, Iowa, 1997

**QUALIFICATIONS:** California Professional Geologist No. 8746  
California Division of Occupational Safety and Health (DOSH), 40-Hour Health and Safety Training  
DOSH, Annual Health and Safety Training Refresher Course

**EXPERIENCE:** Mr. Sullivan has over 18 years of professional experience as an environmental consultant and has been employed by Padre since 2010. He has been involved primarily in geologic and hydrogeologic assessments related to Subtitle D landfill construction and permitting, assessment and remediation of sites contaminated with petroleum hydrocarbons, heavy metals, chlorinated solvents, and PCBs, Phase I and Phase II Environmental Site Assessments (ESAs) and mineral resource assessments. His responsibilities have included project management, developing technical work plans, site conceptual models, corrective action and site closure plans, supervision of field staff, technical and safety training, remedial construction oversight, analytical laboratory data validation, third party technical review, as well as client, contractor, and regulatory agency engagement. Mr. Sullivan has experience supervising and directing assessment and remedial activities including environmental drilling, rock coring and logging, soil sample collection and classification, monitoring and remediation well construction, contaminated soil excavations, removal and in-place closure of underground storage tanks, statistical analysis of detection and assessment groundwater monitoring data, groundwater treatment system pilot testing and operation, sub-slab vapor mitigation design, naturally occurring asbestos (NOA) surveys and assessments, geographic information systems and mapping, historical aerial photograph analyses, air monitoring.

**San Ardo Oilfield Underground Injection Control Aquifer Exemption Demonstration.** Provided technical support in preparation of the Aquifer Exemption Application Package including study of freshwater hydrologic and hydrogeologic resources and infrastructure of the Salinas River Groundwater Basin and demonstration of their isolation from proposed expansion of Class II injection activities in the San Ardo Oil Field. The Aquifer Exemption application was approved by the State of California Department of Conservation Division of Oil Gas and Geothermal Resources, the State of California Regional Water Quality Control Board and the United States Environmental Protection Agency (US EPA).

**Chevron San Luis Obispo Tank Farm Remediation and Restoration Project.** Field Project Manager. Provided technical guidance and oversight to field staff, client managers, and remedial construction contractors to maintain compliance with Project permits and plans. Managed and tracked project metrics and data and for communication to client managers as well

as local, county, state, and federal regulators. Designed, planned, performed, and supervised numerous assessments of contaminated, borrow, and restoration areas to facilitate development of Project Plans, permits, and restoration construction criteria. Developed technical work plans for supplemental assessments to refine and/or augment the scopes of multi-phase remediation activities to maintain or improve schedule performance in conformance with existing remediation plan constraints, timeline agreements, EIR requirements, and regulatory agency permits. Developed a technical plan for on-site treatment of soils contaminated with hazardous concentrations of heavy metals approved by county and state regulators. Developed technical plans to assess and remediate PCB-containing soil utilizing the streamlined U.S. EPA PCB-FAST program.

**Third Party Technical Reviews – Confidential Industrial Clients, Kern County.** Reviewed historical groundwater monitoring and reporting documents associated with oilfield produced water and landfill facilities for compliance with State Regional Water Board orders. Prepared summary reports and recommendations to assist clients with bringing facilities into compliance as well as technical reports demonstrating facility compliance.

### **Excavation Monitoring**

San Luis Obispo and Santa Barbara Counties. Developed soil and groundwater monitoring plans for civil construction projects involving deep soil excavation and groundwater management activities. Performed soil and groundwater monitoring activities directing segregation, storage, and disposal/treatment of hydrocarbon and lead contaminated soil and groundwater.

### **Naturally Occurring Asbestos (NOA)**

Completed geologic evaluations of sites in San Luis Obispo, Kern, Fresno, and Tulare counties pursuant to the California Air Resources Board NOA Air Toxics Control Measure to facilitate requests for exemptions as well as preparation of grading and dust control plan for county and private clients. Provided NOA hazards training to Padre staff and private clients.

**Phase I & II ESA and Mineral Resource Assessments.** Completed several Phase I ESAs of commercial, industrial, ranch and forested land sites throughout San Luis Obispo county, Fresno County, and the Southern Sierra of eastern Kern County. Completed mineral resource assessments of the eastern Kern County sites regarding the likelihood of future mineral resources development.

**Conoco Phillips & Private Clients – LUFT Compliance.** Project and field manager for soil and groundwater assessment and remediation/closure management of operational and non-operational gasoline stations located in Ventura, Santa Barbara, and San Luis Obispo counties, California.

# Robert Vander Weele P.G.

Project Manager

**EDUCATION:** B.S. Hydrogeology, Western Michigan University, Kalamazoo, Michigan, 1998.

**EXPERIENCE:** Mr. Vander Weele joined Padre Associates, Inc. in 2010 and has over 24 years of professional experience as an environmental geologist and environmental consultant. His work experience has been focused on environmental site assessment, remediation, impact assessment, and permitting for private and public-sector clients. Mr. Vander Weele's primary area of environmental impact assessment expertise includes air quality monitoring, air emissions modeling, noise modeling, geologic characterization, and hydrogeological modeling. He is also experienced in the preparation of environmental documentation under the National Environmental Policy Act and the California Environmental Quality Act. Mr. Vander Weele's responsibilities have also included field management of large-scale remediation and site assessment projects, preparation of remedial action plans, technical work plans, assessment reports and closure reports, evaluation of analytical laboratory data, data analysis, risk assessments and coordination with regulatory personnel. Mr. Vander Weele has experience supervising and directing activities that have included soil/bedrock drilling and logging, soil/bedrock sample collection and classification, monitoring and remediation well installation, contaminated soil excavations, removal and in-place closure of underground storage tanks, hydraulic lifts, and oil-water separators. Mr. Vander Weele has performed SWPPP compliance monitoring and reporting activities for large remediation and industrial projects. He has prepared geologic maps/geologic cross-sections portraying contaminant distribution, collected soil vapor, soil, and groundwater samples, prepared soil boring logs, designed and overseen the installation of groundwater monitoring, vapor extraction, and air sparge/ozone wells, conducted groundwater pump, soil vapor extraction, and air/ozone sparge pilot tests.

Representative projects Mr. Vander Weele has completed include:

**Noise Impact Analysis Update, Los Osos Valley Road / US 101 Interchange Improvements Project, San Luis Obispo, California.** Mr. Vander Weele conducted a noise impact analysis update for the City of San Luis Obispo, which consisted of a noise survey, noise modeling and the production of the final report documenting the results.

**Dynegy Morro Bay Power Plant Marine Terminal Decommissioning Project, Morro Bay, California.** Mr. Vander Weele conducted the air emissions modeling and prepared the air quality and greenhouse gases of the revised Project Execution Plan and Initial Study/Mitigated Negative Declaration (IS/MND) for the decommissioning project. Mr. Vander Weele also conducted a noise survey and prepared the noise section of the IS/MND. During project implementation, provided professional geologic oversight of the onshore pipeline removal activities.

**Chevron San Luis Obispo Tank Farm Remediation and Restoration Project,**



**San Luis Obispo, California.** Mr. Vander Weele conducted air emissions modeling for the Construction Activity Management Plan for the San Luis Obispo Tank Farm Restoration Project. He further conducted quarterly project emission estimates for.

**Chevron Lost Hills Solar Project, Lost Hills, California.** Mr. Vander Weele conducted air emissions modeling for the IS/MND for the proposed Chevron Lost Hills Solar Project.

**Chevron Lost Hills Oil Field Air Monitoring Project, Lost Hills, California.**

Mr. Vander Weele conducted and managed air emissions monitoring activities during oil well stimulation treatments at the Chevron Lost Hills Oilfield. He also prepared a final report for submittal to the California Air Resources Control Board discussing the air monitoring program, analytical results, data interpretation, conclusions, and recommendations.

**Construction Activity Management Plan (CAMP), California.** Mr. Vander Weele has prepared numerous CAMPs construction projects throughout San Luis Obispo County.

**Cantil Solar Project, California City, California.** Mr. Vander Weele prepared an Air Quality Impact Assessment for the proposed Cantil Solar Project.

**Bureau of Land Management (BLM) San Joaquin Valley Oil and Gas Ambient Air Monitoring Project, Kern County, California.** Mr. Vander Weele setup and maintained the BLM's Environmental Beta-Attenuation Mass Monitors (E-BAM) in the southern portion of the San Joaquin Valley. He further provided the BLM with data management of the air quality data obtained from the E-BAM units.

**Phase I and Phase II Environmental Site Assessments (ESA) / California, Connecticut, Massachusetts, Michigan, New Jersey, North Carolina, and Washington State.** Mr. Vander Weele conducted numerous Phase I and Phase II ESAs at residential, commercial, and industrial facilities.

## CERTIFICATIONS AND TRAINING:

State of California Registered Professional Geologist No. 8241.

Qualified Storm Water Pollution Prevention Plan Developer and Practitioner (QSD/QSP) Certificate No. G08241

AERMOD Modeling System

Aviation Administration Aviation Environmental Design Tool (AEDT)

California Emissions Estimator Model® (CaleeMod)

Modular Hydrologic Model (MODFLOW)

Small Arms Range Noise Assessment Model (SARNAM)

Federal Highway Administration Traffic Noise Model® 2.5 (TNM 2.5)

SoundPLANessential 5.1

# Natalie Goetz

Staff Planner

**EDUCATION:** B.S. Biology with a Concentration in Marine Science and a Minor in Sustainability, San Diego State University, San Diego, 2019.

**EXPERIENCE:** Ms. Goetz joined Padre Associates in October of 2021 and has over 4 years of professional experience with two universities and an environmental consulting firm as a lab and field technician. She is a certified Protected Species Officer (PSO) through MPSC and has worked on multiple projects involving the U.S Army Corps of Engineers (ACOE) subject to the National Environmental Policy Act (NEPA) and the California Environmental Quality Act (CEQA). She has conducted pre-construction and post-construction biological surveys for a variety of projects in compliance to the mitigation plans specified in the environmental documents. With Padre, Ms. Goetz is currently drafting environmental documents and ensuring environmental compliance for multiple projects across counties from Central to Northern California.

Representative projects Ms. Goetz has worked on include:

**Highway 120 Lodging Hospitality Project, Tuolumne County, California.** Ms. Goetz is currently a Staff Planner in support of the Initial Study/Mitigated Negative Declaration (IS/MND) for the Highway 120 Lodging Hospitality Project (Project). The Project's development includes 200 guest suite accommodations, lodge, market and bar, pool and pool house, soaking tubs, and an events space located on State Route 120 in the Big Oak Flat area near Groveland, Tuolumne County.

**Camp Roberts High Water Bridge Project, Camp Roberts, California.** Ms. Goetz is currently a Staff Planner in support of the joint NEPA/CEQA environmental document for the Camp Roberts High Water Bridge Project (Project). The Project includes constructing a joint access road and pier foundation repair of the existing High Water Bridge. Padre will prepare the joint environmental document with assistance and review from the California Army National Guard (CA ARNG) environmental staff and the National Guard Bureau (NGB-ILE).

**PG&E L123 L-130 Replacement Project, Sacramento and Solano Counties, California.** Ms. Goetz is currently assisting the California State Lands Commission (CSLC) as a Staff Planner for Padre in the preparation of the Draft IS/MND for the decommissioning/replacement of pipeline spanning the Sacramento River across two counties in Northern California. She is working with project management to ensure environmental compliance to CSLC standards. Ms. Goetz is predominantly working on the Hydrology, Hazards and Hazardous Materials, and Geology, Soils, and Paleontological Resources sections of the document, ensuring compliance with the General Plans of both counties.

**Naval Base San Diego Pier 8 Demolition and Reconstruction Project, San Diego, California.** While employed at Merkel and Associates, Ms. Goetz was the PSO during the demolition and reconstruction phases for the modernization of Pier 8 for U.S Navy usage. Her duties were to work alongside Manson construction company, maintaining

continuous monitoring and to provide verbal permission for every pylon that was removed/installed.

**San Diego Bay Maintenance dredging Project, San Diego, California.** While employed at Merkel and Associates, Ms. Goetz was the PSO for the maintenance dredging project throughout San Diego Bay involving ACOE. Her duties were to work alongside dredgers and report any animal sightings and determine level of impact.

**San Diego Bay Habitat Valuation Study, San Diego, California.** While employed at Merkel and Associates, Ms. Goetz assisted in the valuation study of habitat production as it relates to depth in San Diego Bay (SDB) involving the U.S. Navy. Associated with new project construction, this study relates unvegetated bottom productivity with that of eelgrass habitat to determine how future projects will affect the long-established "mitigation bank" pursuant to eelgrass habitat remediation. Ms. Goetz participated in sediment collection from multiple sites in SDB and categorized invertebrates microscopically for data collection.

**CERTIFICATIONS  
AND TRAINING**

"CEQA Training" Certification, University of California San Diego Extension, San Diego, 2021.

**PROFESSIONAL  
AFFILIATIONS:**

California San Diego Chapter, American Planning Association, member #392908

## **APPENDIX B**

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### **REPRESENTATIVE EXPERIENCE**

## REPRESENTATIVE EXPERIENCE

Padre personnel have extensive experience in the management and preparation of a variety of special resource studies, environmental impact analyses, mitigation monitoring reports and supplemental documentation. Our staff members are also experienced in the implementation of mitigation/environmental monitoring programs and providing regulatory analysis and permitting services for public and private clients. Our staff members have worked on commercial, industrial, residential, infrastructure and planning projects that have ranged from the simplistic to the complex and highly controversial. The paragraphs below provide a representative listing of our diverse project experience throughout the region.

### CEQA DOCUMENTS

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#### **Railroad Safety Trail, Taft to Pepper Street Project, San Luis Obispo**

Services: Mitigated Negative Declaration, Natural Environmental Study – Minimal Impact, Initial Site Assessment, Noise Study Report, Archaeological Study  
Client: City of San Luis Obispo, Public Works Department

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Under an on-call contract with the City's Public Works Department, Padre provided archaeological, biological, and planning services for the Railroad Safety Trail Project. The Project includes a new segment of the Railroad Safety Trail from California Boulevard and Taft Street to Phillips Lane and a new pedestrian/bike bridge to Pepper Street. Padre staff prepared a Natural Environment Study with Minimal Impact, Initial Site Assessment, Noise Study Report and an Archaeological Survey Report/Historic Properties Survey Report. Padre's archaeological staff also assisted the City with AB 52 consultation. Upon completion of the technical studies, Padre prepared the Mitigated Negative Declaration for the Project. The Project is currently under construction.



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#### **Morro Bay Power Plant Marine Terminal Decommissioning Project**

Services: Mitigated Negative Declaration, Regulatory Agency Permitting, Biological Studies, and Compliance Monitoring (Onshore and Offshore)  
Client: Dynegy Morro Bay, LLC and California State Lands Commission

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Padre prepared the Mitigated Negative Declaration in coordination with the California State Lands Commission (CSLC) for the Dynegy Morro Bay, LLC Morro Bay Power Plant Marine Terminal Decommissioning Project. Padre also assisted in preparation of the Project Plans including, but not limited to, the Site Restoration Plan, Marine Wildlife Contingency Plan, Cultural Resources Management Plan, Tribal Cultural Resources Management Plan, and Hazardous Materials Management and Contingency Plan. Other Project tasks include preparation of the air quality and greenhouse gas emission calculations, asbestos survey, biological surveys, and nesting bird surveys. Padre also prepared regulatory permit applications



and secured the following permits for the Project: California Coastal Commission Coastal Development Permit, U.S. Army Corps of Engineers Nationwide Permit Authorization, Regional Water Quality Control Board Water Quality Certification, and the California Department of Fish and Wildlife Operation of Law Letter. Padre's staff provided compliance monitoring during construction of offshore and onshore project activities.

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## PERMITTING AND DEVELOPMENT REVIEW

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### **Chevron San Luis Obispo Tank Farm Restoration and Redevelopment Project**

Service: Permitting and Environmental Services

Client: Chevron Environmental Management Company

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Padre provided permitting and environmental services to Chevron Environmental Management Company for the proposed remediation, restoration, and re-development of the former San Luis Obispo Tank Farm Property in San Luis Obispo. This 340-acre property was historically used for the storage of crude oil within the former transportation system on the Central Coast. The property was impacted by the release of petroleum hydrocarbons during a 1926 lightning strike and fire that released over a million barrels of oil to the surrounding area. Padre applied for and obtained permits from the U.S. Army Corps of Engineers, Regional Water Quality Control Board, and California Department of Fish and Wildlife for the remediation and restoration of the former tank farm, including over 30 acres of wetlands, and the eventual re-development of portions of the site for light industrial and business park uses. Padre prepared site wide wetland surveys, rare plant surveys, and a wetland restoration plan for implementation immediately following site remediation activities. Padre also worked with Garcia and Associates on this project to address on-site historical resources concurrently with site-wide planning. The Project is currently undergoing remediation activities.



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## COMPLIANCE MITIGATION MONITORING AND REPORTING

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### **Marsh Street Bridge Project, San Luis Obispo**

Services: Environmental Compliance Services

Client: Filippin Engineering, Inc.

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As a subconsultant to Filippin Engineering, Padre provided environmental compliance services to the City of San Luis Obispo (City), in support of the Marsh Street Bridge Replacement Project (Project). Padre was responsible for documenting compliance with the Project's environmental permits, including Section 1600 Streambed Alteration Agreement, Section 401 Water Quality Certification, and a Caltrans Programmatic Biological Opinion. Padre's biologists were approved by the United States Fish and Wildlife Service (USFWS) to independently survey for and relocate California red-legged frog prior to and during diversion and dewatering activities. National Marine Fisheries Service (NMFS) authorized Padre biologists to relocate steelhead encountered at the Project, under an emergency take permit. Padre biologists installed block nets



and passively relocated steelhead prior to dewatering activities to avoid significant impacts to federally protected fish. Throughout the Project, Padre was a liaison between the City and regulatory agencies, submitting mandated reports and notifications, requesting variances for nesting bird buffers, and providing schedule updates. Padre monitored for special-status wildlife, including nesting birds, California red-legged frog, and steelhead during Project activities. Padre completed pre-activity surveys, construction monitoring, post-construction surveys, and compliance reporting per the Project's permits and Mitigation Monitoring and Reporting Program, as well as, provided worker environmental awareness training to all Project personnel.

## **BIOLOGICAL RESOURCES**

### **Spearman Property Aquatic Resources Delineation, Avila Beach, San Luis Obispo County**

Services: Aquatic Resources Delineation

Client: Kristina Spearman

Padre completed an aquatic resources delineation survey for a residential development project located near Avila Beach, in San Luis Obispo County California. The purpose of the survey was to delineate and make a jurisdictional determination of an aquatic feature within the property. Padre evaluated the potential wetland feature using the three-parameter test (hydrophytic vegetation, hydric soils, and hydrology) in accordance with the *1987 United States Army Corps of Engineers Manual and the Interim Regional Supplement: Arid West Region Version 2.0*. Padre conducted a comprehensive desktop review prior to the field survey to provide historical context and relevant information to assist with the jurisdictional determination. Field survey methods plant identification, digging soil test pits and evaluating for presence of hydric soil indicators, evaluating the site for presence of hydrology indicators, and data was recorded on U.S. Army Corps of Engineers Arid West Wetland Data Forms. Padre prepared a report for the client summarizing the methods used, survey results, jurisdictional determination, and alternatives analysis, with an aquatic resources delineation figure and photos as attachments.



### **Various Residential and Commercial Development Projects, San Luis Obispo County**

Services: Biological Resource Assessments

Client: Multiple (full list available upon request)

Padre has conducted biological resources assessment surveys for numerous residential and small commercial projects throughout San Luis Obispo County within coastal and inland wetland, riparian, and upland habitats. The primary focus of the biological resources assessments was to provide the client with a complete and comprehensive summary of the existing biological and ecological conditions and special-status plants and wildlife that have the potential to occur within the project site and region. In addition, Padre provided recommendations to avoid or minimize impacts to biological resources, sensitive habitats, and potentially occurring special-status species. Key issue areas



that Padre has encountered have included aquatic resources, wetland and riparian habitats, environmentally sensitive habitat areas, special-status plants and wildlife (California red-legged frog, western pond turtle, San Joaquin kit fox, American badger, burrowing owl), and oak trees. In addition to field work, Padre completed queries of environmental databases such as the California Department of Fish and Wildlife's California Natural Diversity Database, United States Fish and Wildlife's Critical Habitat Portal and National Wetland Inventory to obtain relevant information regarding biological resources of the project site.

## CULTURAL RESOURCES

### Avila Ranch Development Project, Buckley Road Extension, City of San Luis Obispo

Services: Archaeological Monitoring

Client: Wathen Castanos Homes

Padre currently provides archaeological and tribal monitors in support of the Buckley Road Extension, which is part of the larger Avila Ranch Development Project in the southern part of the City of San Luis Obispo. In compliance with the mitigation measures included in the Project Environmental Impact Report, one Padre archaeologist and one member of the local Chumash tribe monitor all Project-related ground disturbance for the presence of significant cultural materials and features. Prior to ground disturbance, the Padre archaeologist provides cultural resource awareness training for all construction personnel. Padre is also contracted to monitor the remaining phases of the Avila Ranch Development Project in 2022 and beyond. Once all ground disturbance is complete, the senior archaeologist will prepare a cultural resource completion report summarizing all encountered finds. Cultural concerns associated with this project have required frequent communication with the *yak tit'u tit'u* Northern Chumash tribe.



## NOISE STUDIES

### Los Osos Valley Road/U.S. 101 Interchange Improvements Project, San Luis Obispo

Services: Noise Study

Client: City of San Luis Obispo

Padre assisted the City of San Luis obispo in the preparation of a noise study and subsequent noise impact analysis for the interchange improvement project near the Los Osos Valley Road overcrossing in June 2008. This project addressed the congestion and related degradation of the Level of Service (LOS) that is projected for the 2035 scenario in the corresponding area. Padre staff used 38 receptor locations to analyze six project alternatives. The analysis indicated that there would be no substantial noise level increase during operation of the completed project from pre-existing conditions.





# **APPENDIX C**

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## **FEE SCHEDULE**

## 2021 STANDARD FEE SCHEDULE

### PROFESSIONAL SERVICES

Principal Professional II .....	\$ 210/hr
Principal Professional .....	\$ 180/hr
Senior Professional II.....	\$ 160/hr
Senior Professional.....	\$ 150/hr
Project Professional II.....	\$ 130/hr
Project Professional.....	\$ 120/hr
Staff Professional II.....	\$ 110/hr
Staff Professional.....	\$ 95/hr
Senior Technician (Non-Prevailing Wage).....	\$ 90/hr
Senior Technician (Prevailing Wage).....	\$ 95/hr
Technician (Non-Prevailing Wage) .....	\$ 80/hr
Technician (Prevailing Wage) .....	\$ 85/hr
Senior GIS/CAD Specialist.....	\$ 110/hr
GIS/CAD Specialist.....	\$ 95/hr
Drafting.....	\$ 75/hr
Word Processing/Technical Editor .....	\$ 80/hr

\*Overtime rates for Technicians and Office Staff is 1.3 x rates shown.

Fees for expert witness preparation, testimony, court appearances, or depositions will be billed at the rate of \$425 per hour.

### OTHER DIRECT CHARGES

Subcontracted Services.....	Cost Plus 15%
Outside Reproduction.....	Cost Plus 15%
Travel, Subsistence, and Expenses.....	Cost Plus 15%
Vehicle .....	\$ 80/day
Photoionization Detector .....	\$ 120/day
Nuclear Density Gauge .....	\$ 85/day
Automobile Mileage .....	\$ 0.85/mile

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June 2, 2022

Charles Grace, General Manager  
San Simeon Community Services District  
111 Pico Avenue  
San Simeon, CA 93452

**Re: San Simeon Community Services District – Request for Proposal for On-Call Planning, Permitting and Environmental Services**

Dear Mr. Grace,

Terra Verde Environmental Consulting, LLC (Terra Verde) is pleased to submit this Statement of Qualifications for consideration by the San Simeon Community Services District (SSCSD), to be approved for on-call planning, permitting and environmental services for a period of three years. We understand the typical environmental consulting needs of the SSCSD and offer a broad range of services and expertise relevant to the natural resources of the area. This proposal is valid for 120 days.

Terra Verde does not currently have any specific plans to use subcontractors to perform this scope of work, and the vast majority of work performed by Terra Verde is performed by employees. To our knowledge, no conflicts of interest, family, or financial relationships exist between Terra Verde or any of its employees and the SSCSD.

Terra Verde Environmental Consulting is an LLC located in the state of California. Terra Verde does not currently have any litigation pending. Terra Verde also does not have any bankruptcy or insolvency proceedings from any point in the last 10 years.

Should you have any questions related to this proposal, please contact me at [blangle@terraverdeweb.com](mailto:blangle@terraverdeweb.com) or 805-896-5479. Thank you for your consideration.

Sincerely,

A handwritten signature in black ink that reads "Brooke Langle".

Brooke Langle, Principal  
(805) 592-2855  
[blangle@terraverdeweb.com](mailto:blangle@terraverdeweb.com)  
3765 S Higuera Street, Suite 102  
San Luis Obispo, CA 93401

Electronic Submittal: Electronic copy of proposal submitted via email on 6/2/22  
Hard Copy Submittal: Hard copy hand delivered to SSCSD office on 6/2/22.



**TERRA VERDE ENVIRONMENTAL  
CONSULTING, LLC**

3765 South Higuera Street, Suite 102

San Luis Obispo, California 93401



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## FIRM OVERVIEW

Terra Verde Environmental Consulting, LLC (Terra Verde) is pleased to provide this Statement of Qualifications to the San Simeon Community Services District, highlighting Terra Verde's extensive experience in the environmental consulting industry. Our main office is located in the City of San Luis Obispo and would be the primary point of service for District projects.

Terra Verde is an environmental consulting firm founded in 2007 by Principal Biologist Brooke Langle. Ms. Langle was joined by Principal Biologist Brian Dugas in 2011. Terra Verde consistently provides high quality biological and environmental planning services to our clients as they negotiate the environmental review, permitting, and compliance processes. We have developed our reputation and the trust of our clients by providing a thorough, unbiased, and professional evaluation of every project.

Terra Verde has extensive experience in the public sector, including city and county governments, public works, and special districts. We have worked with several special districts, including Cambria Community Services District and Santa Ynez Community Services District and currently maintain an on-call contract with the Oceano Community Services District. Additionally, Terra Verde has maintained numerous on-call biological services contracts with other government entities including County Public Works Departments, Planning Departments, and General Services Agencies. We have conducted peer review for the City of Morro Bay and San Luis Obispo County, as well as provided biological services to the City of Arroyo Grande, City of Atascadero, and the City of Paso Robles. Terra Verde also holds contracts with large entities such as the California Army National Guard.

Terra Verde is an established environmental consulting firm which is independent of the San Simeon Community Services District.

Terra Verde is a certified woman-owned and LGBT business enterprise by the California Public Utilities Commission (CPUC) (Certificate # 9LS00115), a certified small/micro-business by the State of California (#57155), and a disadvantaged business enterprise by the California Department of Transportation.

## OFFICE LOCATIONS

- Main Office (San Luis Obispo, CA) – 3765 S Higuera St, Suite 102, San Luis Obispo, CA 93401
- Satellite Office (Port Angeles, WA) – 618 S Peabody Street, Unit K, Port Angeles, WA 98362



## EXPERIENCE SUMMARY

### ON-CALL ENVIRONMENTAL AND PERMITTING SUPPORT SERVICES

Terra Verde has assisted a number of clients via on-call contracts for environmental and permitting support services. Our services have included:

- Focused constraints analysis and constructability reviews,
- biological resources assessments and jurisdictional determinations,
- completion of pre-application meetings with regulatory agencies,
- assistance with developing appropriate project specific mitigation measures,
- site restoration planning and implementation
- regular coordination with regulatory and jurisdictional agencies,
- completion of the regulatory agency permitting process,
- assistance with CEQA and NEPA review process,
- support with grant application development and implementation,
- regularly meeting with client representatives and assistance with planning, organizing, and overall project management.

### BOTANY

Terra Verde botanists have conducted numerous botanical surveys for public and private clients, including the annual monitoring of the federally threatened purple amole (*Chlorogalum purpureum* var. *purpureum*) on Camp Roberts and the federally endangered San Luis Obispo fountain thistle (Chorro Creek Bog Thistle) (*Cirsium fontinale* var. *obispoensis*) at Camp San Luis Obispo for the California Army National Guard. Additionally, we implemented the long-term habitat restoration monitoring for Topaz Solar Farm, operated by BHE Renewables, in eastern San Luis Obispo County. Lastly, Terra Verde has conducted numerous general and focused botanical surveys for hundreds of clients.





## WETLAND DELINEATION

Terra Verde's wetland work is led by Mr. Dugas with assistance from our botanists. Mr. Dugas regularly conducts wetland delineations and Waters of the U.S. and State jurisdictional determinations. Additionally, Ms. Langle helped develop and has taught a senior level wetlands course at California Polytechnic State University in San Luis Obispo (Cal Poly). Our staff conducts wetlands field work and generates the needed technical documentation for these resources. We have prepared countless permit applications for potential and actual waters and wetland impacts on behalf of our clients, and have assisted them with developing appropriate avoidance, mitigation, and restoration measures where warranted.

## WILDLIFE BIOLOGY

Our biologists have experience with a variety of wildlife species, including many special-status species that occur along the central coast, such as:

- American badger (*Taxidea taxus*)
- Monterey dusky-footed woodrat (*Neotoma macrotis luciana*)
- California red-legged frog (*Rana draytonii* [CRLF])
- Western pond turtle (*Actinemys marmorata*)
- Western spadefoot toad (*Spea hammondi*)
- Coast horned lizard (*Phrynosoma blainvillii*)
- California legless lizard (*Anniella pulchra pulchra*)
- Two-striped garter snake (*Thamnophis hammondi*)
- South-central California coast steelhead (*Oncorhynchus mykiss*)
- Northern tidewater goby (*Eucyclogobius newberryi*)
- Western snowy plover (*Charadrius nivosus*)
- Avian species
- Vernal pool species
- Marine mammals



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## CALIFORNIA RED-LEGGED FROG

Terra Verde biologists work with CRLF and regularly receive approval from the United States Fish and Wildlife Service (USFWS) to survey, monitor, handle, and relocate CRLF when necessary. Terra Verde's experience with CRLF began in 1995 prior to the species being listed as threatened under the federal Endangered Species Act. Ms. Langle conducted surveys and research with the United States Geological Survey (USGS) biologists studying this species within San Simeon State Park. This work included surveys, capture, and pit-tagging of CRLF. Since that time, our biologists have had extensive experience with CRLF throughout the species' range, particularly in San Luis Obispo and the surrounding counties.

## AVIAN BIOLOGY

Avian biology has become a key component of Terra Verde's work. We conduct habitat assessments, preconstruction surveys, nest monitoring during construction, and prepare reports. Each spring, our biologists monitor avian nesting activity as required by the Migratory Bird Treaty Act and CDFW code, as well as conduct targeted surveys for special-status bird species such as burrowing owl (*Athene cunicularia*), golden eagle (*Aquila chrysaetos*), bald eagle (*Haliaeetus leucocephalus*), Swainson's hawk (*Buteo swainsoni*), southwestern willow flycatcher (*Empidonax traillii extimus*), and least Bell's vireo (*Vireo bellii pusillus*). Additionally, our biologists have conducted surveys and monitoring for the western snowy plover.

## REGULATORY PERMITTING SUPPORT AND AGENCY COORDINATION

Terra Verde works regularly with local, state, and federal agencies and has represented clients during meetings with the agencies to discuss projects until final permit approval and/or authorization to proceed is received. This includes regularly conducting pre-application meetings with agency representatives to discuss overall project objectives, permit application process and requirements, likely permitting path forward, tentative permitting timeline, and mitigation requirements to ensure a successful outcome. We find that this approach, along with early communication with the regulatory agencies, speeds the timing and increases the effectiveness of our work and aids in the ultimate goal of obtaining permits for our clients. As part of this process, our firm has developed, submitted, and obtained numerous permits and authorizations from the United States Army Corps of Engineers (the Corps), United States Fish and Wildlife Service (USFWS), the Regional Water Quality Control Board (RWQCB), and the California Department of Fish and Wildlife (CDFW). We have also submitted numerous biological documents in support of projects requiring Caltrans and the Federal Highway Administration (FHWA) authorization.



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#### CALIFORNIA ENVIRONMENTAL QUALITY ACT (CEQA)

Terra Verde has extensive experience in the management and preparation of a variety of special resource studies (primarily biological and botanical), mitigation monitoring programs, and supplemental documentation in support of the CEQA process for our clients. Our staff have worked on commercial, industrial, residential, and infrastructure projects that have ranged from simplistic (minor permits) to complex and controversial (repair projects for community service districts). This includes support of post CEQA filing project implementation including oversight and environmental compliance monitoring.

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#### NATIONAL ENVIRONMENTAL POLICY ACT (NEPA)

Projects involving federal approvals and/or financing through federal funding require environmental documentation under NEPA. The key to successfully completing these documents is early and effective communication with the federal lead agency and understanding their NEPA implementation guidelines. Terra Verde staff have prepared numerous technical studies and documents in support of the NEPA process and are familiar with the specific environmental documentation and review requirements of several federal agencies including USFWS, the Corps, and the FHWA.

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#### ENDANGERED SPECIES ACT AND THE CALIFORNIA ENDANGERED SPECIES ACT

A majority of the work conducted by Terra Verde is driven by the federal and California Endangered Species Acts. We assist our clients in navigating this complex regulatory process and successfully obtain permits on their behalf. The key to our success is the consistent implementation of the following approach: conducting thorough research and field work to identify potential sensitive species; working closely with our clients via planning and developing the project description to avoid or minimize impacts, as feasible; and, working diligently to develop mitigation measures that are both cost-effective and successful in reducing the level of potential impacts. Our significant experience with the regulatory agencies and their expectations helps us to address and resolve issues prior to CEQA review or permitting. Again, we find that this approach, along with early communication with the regulatory agencies increases efficiency and aids in the ultimate goal of obtaining permits for our clients.

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#### REGULATORY AND JURISDICTIONAL AGENCY COORDINATION

Terra Verde staff routinely assists clients in obtaining permits from federal, state, and local regulatory agencies. The following table includes a list of the agencies we typically work with and the type of permits and/or consultation obtained.



Federal, State, and Local Agencies	Permit Obtained
National Marine Fisheries Service	Biological Opinions (via consultation with the Corps)
U.S. Army Corps of Engineers	Jurisdictional Determinations, Nationwide Permitting Program authorizations
U.S. Fish and Wildlife Service	Biological Opinions (via consultation with Corps)
California Department of Fish and Wildlife	Lake and Streambed Alteration Agreements
Regional Water Quality Control Board	401 Water Quality Certifications/Waivers
County of San Luis Obispo	Minor Use Permits, Conditional Use Permits, Grading Permits, Temporary Events Permits

#### PROJECT MANAGEMENT AND SUPPORT

At Terra Verde, we understand the complexity and often time-sensitive nature of the diversity of projects we may support for our clients and how delays or inefficiencies can impact the project budget and schedule. Our team thoroughly reviews and understands proposed project activities and completes background research, surveys, and reporting per regulatory agency requirements to ensure the project remains in compliance and has complete information for the permitting process. Our staff are dedicated to high quality work, positive communication with project team members, and timely submission of reports and other deliverables. Our staff consistently work to track our projects internally, including budgets, costs, scheduling, and deadlines. Additionally, Terra Verde has assisted large utility clients with a wide variety of project management tasks.

#### GRANT IMPLEMENTATION SUPPORT

Terra Verde has supported with several clients in grant application development and implementation, including attending coordination meetings, completing biological and botanical surveys, assessing waters and wetlands, preparing biological and wetland delineation reports, preparing and submitting agency permit applications, permit tracking and follow up support, and drafting site restoration plans. Most recently, Terra Verde supported Creek Lands Conservation with the grant application development and regulatory agency permitting for the Marre Weir Fish Passage Improvement Project in lower San Luis Obispo Creek. Tasks included a focused biological resources assessment, wetland delineation, site restoration planning/design and implementation of the regulatory agency permit process.

## ENVIRONMENTAL COMPLIANCE INSPECTION

Terra Verde has developed an impeccable reputation in the environmental compliance industry. Our staff have logged thousands of hours providing biological preconstruction surveys, environmental trainings, biological monitoring, and environmental compliance inspections for many clients. Our biologists and botanists understand the importance of high-quality survey and reporting work ahead of construction activities, and provide clear, relevant environmental crew trainings. Our employees are professional and responsive as monitors or inspectors, ensuring to look ahead to avoid environmental impacts or cause unexpected delays. Terra Verde has provided environmental compliance services on numerous County Public Works projects in the Central Coast region including the San Simeon Creek Road Bridge Replacement projects.

## REPRESENTATIVE PROJECT EXPERIENCE

### ENVIRONMENTAL COMPLIANCE AND RESOURCE MANAGEMENT

#### ARROYO GRANDE CREEK WATERWAYS IMPROVEMENT PROJECT, SAN LUIS OBISPO COUNTY

Terra Verde is providing environmental support services to the County of San Luis Obispo for the Arroyo Grande Creek Waterways Improvement Project, located near the City of Arroyo Grande and the community of Oceano, in San Luis Obispo County. The project involves the phased implementation of a maintenance and monitoring program within the Arroyo Grande Creek and Los Berros Creek flood control channels. Terra Verde is providing support and oversight of mitigation installation activities, maintenance of mitigation areas, and annual monitoring and reporting activities. Annual monitoring surveys include a robust analysis of the vegetation composition, wildlife use, habitat value, and recommendations for the implementation of adaptive management strategies to meet diverse project goals.



Terra Verde is coordinating all aspects of this multi-year project to identify and address maintenance needs and coordinate schedules. In addition, Terra Verde provides expertise in protection of relevant sensitive species, including south-central California coast steelhead and CRLF, both federal threatened species, as well as nesting and special-status avian species.

## PERMITTING SUPPORT AND AGENCY COORDINATION

### EMERGENCY WATERLINE REPAIR PROJECT, OCEANO COMMUNITY SERVICES DISTRICT

Terra Verde supported the Oceano Community Services District with permitting assistance and compliance monitoring for an emergency repair of an existing waterline within the Oceano Lagoon. The proposed project alignment intersected the tidally influenced portion of the lagoon and was within the originally retained jurisdiction of the California Coastal Commission. Terra Verde conducted a focused biological constraints analysis of the project alignment and supported the project team with the early design phase to ensure avoidance of sensitive resources. Tasks included completion of a jurisdictional determination, biological assessment, and preparing emergency permit applications for submittal to the California Coastal Commission and California Department of Fish and Wildlife. Terra Verde also supported the district with their internal CEQA exemption



filing. Following agency authorization to proceed, Terra Verde conducted pre-activity surveys, environmental training, and compliance monitoring. Sensitive resources with potential to occur on site included California red-legged frog, western pond turtle, and migratory nesting birds.

### CITY OF SAN LUIS OBISPO SEDIMENT REMOVAL PROJECTS

Terra Verde has supported the City of San Luis Obispo with obtaining appropriate agency permits for several high priority sediment removal projects in San Luis Obispo and Prefumo Creeks. We provided permitting assistance in 2011, 2014, 2017, and 2021, obtaining Corps Section 404 Nationwide Permits, Regional Water Quality Control Board (RWQCB) Section 401 Water Quality Certification, and a five-year Routine Maintenance Agreement with CDFW for numerous sediment removal projects in San Luis Obispo. We are currently supporting the City by obtaining new agency permits for similar high priority sediment removal projects that are expected to be completed in 2022. This includes performing biological reconnaissance surveys, identifying and mapping jurisdictional boundaries, preparing permit application packages, consulting with agencies, and tracking permits.



MORRO BAY TO CAYUCOS CONNECTOR, SAN LUIS OBISPO COUNTY PARKS



Terra Verde was awarded a contract to prepare NEPA documents and resource agency permits for the Morro Bay to Cayucos Connector Project. The project includes an approximately 2.5-mile-long multi-use (Class I) trail connecting the north end of the City of Morro Bay with the southern end of Cayucos. Biological resources documents, including a Biological Assessment, and cultural resources documents were prepared per

FHWA guidelines. Terra Verde is working closely with the project engineers to develop a site restoration plan and ensure resources are avoided to the extent feasible. In addition to biological resources, cultural and aesthetic resources will be managed and issues such as hazardous materials, bluff retreat, and parking capacity will be addressed. Terra Verde will be supporting the regulatory agency permitting process as part of the next phase. A number of special-status wildlife and plant species occur in the project area, such as CRLF, western snowy plover, red sand-verbena (*Abronia maritima*), and California seablite (*Suaeda californica*), as well as numerous Environmentally Sensitive Habitat Areas along the coast.

BLOSSER BIORETENTION SYSTEM PROJECT, CITY OF SANTA MARIA

Terra Verde was awarded a contract to assist the City of Santa Maria with conducting a biological resources assessment and subsequent permitting assistance in support of the proposed Blosser Bioretention System Project located in the City of Santa Maria, Santa Barbara County California. The proposed project included construction of a bioretention system for the purposes of reducing storm water contamination upstream of the receiving waters of the Santa Maria River. Terra Verde



conducted a comprehensive wildlife and botanical survey of the 5.75-acre project site. We provided jurisdictional determination for the subject storm water conveyance feature, conducted biological surveys, prepared a biological resources assessment report, and prepared permit applications for submittal to the Corps, CDFW, and RWQCB. Sensitive resources with potential to occur on site were CRLF, western pond turtle, monarch butterfly (*Danaus plexippus*), and migratory nesting birds. Deliverables included a complete species inventory and a comprehensive report detailing findings, potential impacts to sensitive resources, and suggested mitigation and avoidance measures.

## GRANT IMPLEMENTATION SUPPORT

### SAN LUIS OBISPO CREEK MARRE WEIR FISH PASSAGE IMPROVEMENT PROJECT, CREEK LANDS CONSERVATION



Terra Verde provided environmental support services to Creek Lands Conservation for the Marre Weir Fish Passage Improvement Project. This project is a grant-funded project to replace the existing weir structure within San Luis Obispo Creek to improve conditions for fish migration, specifically adult steelhead and lamprey. Services included support with grant application development, attending Technical Advisory Committee coordination meetings, completion of biological and botanical surveys and a formal wetlands delineation, development of a site restoration plan, preparation and submittal of agency permit applications, permit tracking and follow up support. Terra Verde is currently supporting Creek Lands Conservation to acquire additional grant funding to complete the permit process as well as project implementation.

## BIOLOGICAL SURVEYS

### MEADOW CREEK LAGOON BIOLOGICAL ASSESSMENT, SAN LUIS OBISPO COUNTY

Terra Verde was awarded a contract from the County of San Luis Obispo Public Works Department to conduct a comprehensive biological resources assessment of the Meadow Creek Lagoon area after a series of flooding events impacted the low-lying properties in surrounding areas. The biological resources assessment data informed the County's development of viable alternatives to improve overall flood control within the system. Biological survey tasks completed on behalf of the County included a seasonally timed botanical survey and floristic inventory, wetland delineation, general wildlife surveys, protocol-level CRLF surveys, fisheries assessments, and completion of a biological resources assessment technical report. Mr. Dugas led the majority of field surveys with support from Ms. Langle. The final technical report included recommended mitigation measures to assist the County with implementation of future flood control improvement projects in the project area.





## BIOLOGICAL COMPLIANCE MONITORING

### AIR PARK DRIVE BRIDGE REPLACEMENT PROJECT, SAN LUIS OBISPO COUNTY



Terra Verde provided biological monitoring and permit compliance reporting for the County of San Luis Obispo during replacement of an old wooden bridge spanning the western portion of the Meadow Creek lagoon on Air Park Drive in Oceano, CA. The project included the temporary installation of upstream and downstream sheet pile cofferdams, a series of bypass overflow pipes, demolition and replacement of the existing bridge, and restoration of the streambanks.

Terra Verde conducted preconstruction surveys, daily construction monitoring, and routine site inspections focused on guiding the County in compliance with the California Department of Fish and Wildlife Streambed Alteration Agreement, Section 401 Water Quality Certification, and U.S. Army Corps of Engineers Nationwide Permit. This included assistance with pre-activity surveys for tidewater goby (seine pulls) led by fisheries biologist Johanna Kisner within the open channel habitat area beneath Air Park Drive Bridge. Daily duties included environmental training for construction personnel, conducting daily pre-activity surveys for CRLF and western pond turtle, documentation of compliance with permits, coordination with the County's contractor, and close coordination of site conditions with the County Resident Engineer.

Terra Verde monitored all cofferdam removal activities and played a critical role in facilitating final site recontouring as well as oversight of non-native *Arundo donax* removal efforts within the mitigation area. In summary, Terra Verde coordinated between the County and their contractor to achieve overall permit compliance while also allowing construction to continue without interruption.

### PRICE CANYON ROAD WIDENING PROJECT – PHASE II, SAN LUIS OBISPO COUNTY

Terra Verde was awarded the biological monitoring compliance contract with the County Department of Public Works for the Price Canyon Road Widening Project – Phase II. As part of the biological monitoring scope, Terra Verde completed preconstruction surveys for special-status plants and wildlife species. Biologists conducting wildlife surveys received preapproval from the USFWS under a Programmatic Biological Opinion to survey, monitor, and relocate CRLF, as necessary. Special-status botanical species observed during preconstruction surveys included the federally listed Pismo clarkia (*Clarkia speciosa* ssp. *immaculata*) as





well as California Native Plant Society (CNPS) listed plant species Santa Margarita manzanita (*Arctostaphylos pilosula*) and black-flowered figwort (*Scrophularia atrata*).

During initial project implementation, Terra Verde biologists provided guidance for the County's contractor during installation of delineation fencing to ensure all populations of Pismo clarkia were protected from disturbance. Additionally, Terra Verde conducted seed collection for black-flowered figwort, per the approved mitigation plan, ahead of construction disturbance. Terra Verde biological monitors maintained frequent communication with the County Environmental Resource Specialist and Resident Engineer while working collaboratively with the site contractor to ensure construction operations were in compliance with regulatory permitting measures. During the nesting bird season, Terra Verde helped to develop reduced buffer areas as approved by CDFW to facilitate construction progress while protecting sensitive avian resources discovered in the project area. Compliance infractions encountered during construction were resolved in a prompt, professional manner by maintaining lines of communication between all parties of the project team. Terra Verde monitoring duties also included providing environmental trainings for new project personnel, compliance reporting, and providing project completion reporting for all agency permits.

## PERSONNEL

Resumes for key staff are attached to this proposal.

### BROOKE LANGLE, PRINCIPAL BIOLOGIST

*Specialties: Biological Peer Review, Environmental Compliance, Wildlife Biology, Wetlands, CRLF*

In 2007, Ms. Langle created Terra Verde with the goal of returning to her passion: biological field work. Ms. Langle moved to San Luis Obispo in 1990 to attend Cal Poly and began her biological field work as a student, then later as a volunteer on local research projects. These projects included working as an intern for the County of San Luis Obispo's Planning Department and later working with the USGS staff conducting research on CRLF and other sensitive species. Upon graduating from Cal Poly in 1995, Ms. Langle continued her career in field biology as an independent consultant. Over a period of 12 years, she worked for several consulting firms and gained project management, supervision, and marketing skills relating to environmental consulting services until she started Terra Verde. She acted as the national Environmental Compliance Manager for Essex Environmental, later TRC Solutions, and was responsible for the management and quality control of environmental compliance and training services for the company throughout the United States. During the second year of business for Terra Verde, Ms.



Langle secured an on-call contract with the County of San Luis Obispo's Planning Department for conducting biological peer review services. Terra Verde continues to provide peer review services to the County, including assisting the County with developing training for consulting biologists as well as County planners.

Ms. Langle holds a California Scientific Collector's Permit (#5592) and maintains a certificate of completion for 40-hour Hazwoper and 24-hour first responder (operations level) training, including the required annual 8-hour Hazwoper refresher courses. She has extensive experience with CRLF as well as other sensitive species.

#### BRIAN DUGAS, PRINCIPAL BIOLOGIST

*Specialties: Wildlife, Fisheries, CRLF, Wetlands, Permitting*

Mr. Dugas has 25 years of experience in the environmental field as an environmental specialist with emphasis in biological resources impact analysis. During this period, Mr. Dugas performed numerous environmental impact assessments, including baseline biological resources evaluations, biological and regulatory constraints analyses, and sensitive habitat studies for a variety of CEQA and NEPA projects. His experience includes regulatory permitting for abandonment of coastal oil facilities, including several offshore marine terminals and associated onshore pipeline corridors, and implementation of flood control, transportation, and other public works-related improvement projects. Permitting efforts involved close coordination with all applicable regulatory agencies, including formal and informal special-status species consultations with the CDFW and USFWS under the federal and California Endangered Species Act. He has extensive experience with sensitive species, including CRLF and steelhead trout and leads Terra Verde's waters and wetland delineation program. This experience has included numerous field evaluations and preactivity surveys for federally listed species utilizing approved survey protocols.

Mr. Dugas holds a M.S. degree in General Agriculture with emphasis in Fisheries and Wildlife Management and a B.S. degree in Natural Resources Management from Cal Poly. Mr. Dugas is also a Certified Professional in Erosion and Sediment Control (#6727) and holds a California Scientific Collector's Permit (#5592). Further, Mr. Dugas maintains a certificate of completion for 40-hour Hazwoper and 24-hour first responder (operations level) training, including the required annual 8-hour Hazwoper refresher course.



#### ROBYN POWERS, SENIOR BIOLOGIST

*Specialties: Rare and endangered wildlife, SJKF, scent-detection dogs, data management and analysis*

Ms. Powers is a broadly trained wildlife ecologist with nearly 20 years of experience, with an emphasis on rare and endangered species surveys and research. She holds a Bachelor of Science in Environmental Science from the University of Denver in Colorado, and a Master of Science in Biology, with an emphasis on Wildlife Behavior and Physiology, from San Francisco State University. Ms. Powers joined Terra Verde in early 2019 as a Senior Biologist, bringing 10 years of consulting experience and 6 years of experience as a Senior Wildlife Biologist and Project Manager.

Much of her work has focused on rare and endangered mammals and herpetofauna, but she has worked in support of projects focused on a variety of taxa. Ms. Powers has led survey and monitoring efforts at renewable energy facilities, on conservation lands managed or proposed for habitat conservation plans, for transportation projects, and for a variety of construction projects in California locales such as the San Joaquin Valley, Central Coast, Bay Area, and the Channel Islands. During her eight years as a project manager, Ms. Powers has worked with multiple local rare and endangered species and has advised on and implemented avoidance and minimization measures for large- and small-scale construction projects in the County. She has extensive experience with and has been approved by USFWS and/or CDFW to survey for, monitor, trap, handle, and/or mark island foxes, SJKF, giant kangaroo rats, and Nelson's antelope squirrels, as well as other local sensitive species. In addition, Ms. Powers managed a scent-detection dog program for six years, led multiple dog-handler teams in pilot studies to detect new species, is a trained detection dog handler, and owns two working dogs trained to detect SJKF scat and bird and bat fatalities. Lastly, Ms. Powers holds a Scientific Collecting Permit (#10093), issued by CDFW.

#### SARA SNYDER, WILDLIFE BIOLOGIST

Ms. Snyder joined Terra Verde in 2018, bringing 15 years of experience conducting biological assessments, special-status species surveys, and monitoring for environmental compliance for a variety of projects. In addition to surveying and monitoring for special-status species, Ms. Snyder brings broad avian identification, survey, and behavior experience. As a consultant, Ms. Snyder has numerous hours of experience searching for, identifying, establishing exclusion buffers, and monitoring nests on a variety of projects including for PG&E Wildfire Safety and Inspection Program, during the construction of the California Valley Solar Ranch in California Valley, California and for a number of bridge replacement projects in San Luis Obispo County. In addition, while employed at Arches National Park, Ms. Snyder conducted park-wide breeding raptor and songbird surveys and monitoring which included



identification and documentation of raptor nests, weekly breeding songbird surveys to determine nesting territories, and monitoring a great blue heron rookery.

Ms. Snyder's experience extends to several other relevant taxa. For example, Ms. Snyder has conducted numerous CRLF habitat assessments and protocol-level surveys and has surveyed for and assessed habitat for western pond turtle.

#### PATRICK SCOTT, WILDLIFE BIOLOGIST

Mr. Scott has over 10 years of experience conducting rare and endangered species surveys, biological assessments, and environmental compliance for a wide variety projects. Mr. Scott's duties have included: habitat assessments, protocol-level or as equally intensive surveys, and/or monitoring for American badger (*Taxidea taxus*), burrowing owl (*Athene cunicularia*), steelhead (central and south-central DPS; *Oncorhynchus mykiss*), and CRLF. He has also conducted numerous biological trainings and aided with habitat restoration, monitoring.

Most recently, Mr. Scott has conducted a number of acoustic bat surveys as well as CRLF and pond turtle surveys ahead of project implementation.

#### AMY GOLUB, BOTANIST AND PERMITTING LEAD

*Specialties: Botany, Environmental Compliance, Permitting*

Ms. Golub has a B.S. degree in Environmental Sciences with an emphasis on natural resources management and conservation and a B.A. in geography from San Francisco State University. Ms. Golub has six years of professional experience in the environmental field of botany and restoration including three years of focus on environmental compliance for a wide variety of projects on the Central Coast. Ms. Golub joined Terra Verde in 2015 and responsibilities have included: project management, permitting, biological and botanical resource surveys, vegetation community mapping, oak tree/native tree inventory surveys, rare plant surveys, rare plant mapping and monitoring, jurisdictional determinations, wetland delineations, erosion control implementation and monitoring, preactivity nesting bird surveys, CRLF surveys, native seed collection, and restoration design and implementation. In conjunction with biological fieldwork, office duties performed by Ms. Golub include technical document writing, biological resources assessments, literature and database searches, and data analysis.

Ms. Golub holds a CDFW California Endangered Species Act and Native Plant Protection Act Plant Voucher Collecting Permit (No. 2081(a)-15-073-V). In addition, Ms. Golub holds a 40-hour Hazwoper



certificate and Mine Safety and Health Administration (MSHA) certificate with required 8-hour refresher courses.

## CONTACT

Brooke Langle is both the contact for coordination during the proposal evaluation as well as the individual authorized to negotiate on behalf of Terra Verde.

Brooke Langle, Principal Biologist

3765 S. Higuera Street, Suite 102

San Luis Obispo, California 93401

Phone: 805-896-5479

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[blangle@terraverdeweb.com](mailto:blangle@terraverdeweb.com)

## SCOPE OF SERVICES

Terra Verde proposes to assist the San Simeon Community Services District in the following tasks:

- **Task 1** – Regulatory agency permitting support for capital improvement projects:
  - Preliminary review of capital improvement projects to determine potential environmental constraints and regulatory agency permit triggers. This would include a preliminary desktop review of the site followed by a focused biological constraints analysis and jurisdictional determination in support of the project design phase, as needed. Following preliminary review and design, Terra Verde would support the constructability review process to aid in establishment of the overall project permitting and construction schedule.
  - Once the preliminary project design and planning phases are complete, Terra Verde would conduct a focused biological resources assessment in support of the environmental review process (i.e., CEQA/NEPA phase) and regulatory agency permitting process. If necessary, this would include completion of a focused waters and wetland delineation and development of a compensatory mitigation plan to offset any unavoidable project impacts to jurisdictional areas and/or environmentally sensitive habitat areas (ESHA) as defined in the County Coastal Zone Land Use Ordinance.



- Terra Verde would then complete all applicable regulatory agency permit applications for submittal including but not limited to the Corps, RWQCB, and CDFW. This would include any necessary federal consultations with the USFWS and/or NMFS for impacts to listed species per the Endangered Species Act. Further, Terra Verde would support the coastal development permit process for projects with impacts within the originally retained jurisdiction of the California Coastal Commission and/or those involving lease agreements with the California State Lands Commission (i.e., offshore outfall pipeline). Terra Verde would facilitate the permit process on behalf of the San Simeon Community Services District until all final permits are issued and/or authorizations to proceed are granted by all required regulatory agencies.
- **Task 2** – Regular coordination with regulatory and jurisdictional agencies:
  - This would include pre-application meetings with agency representatives to discuss overall project objectives, permit application process, tentative permitting timeline, and mitigation requirements to ensure a successful outcome. Further, Terra Verde would regularly communicate with the agencies on behalf of the San Simeon Community Services District to facilitate the permit process once the permit applications are filed. This approach will expediate the overall timing of the permit process to remain on schedule. Lastly, Terra Verde will provide the appropriate project notifications and reporting to the agencies per the permit conditions during project implementation.
- **Task 3** – Project management and project support:
  - As part of this task, Terra Verde principal Brooke Langle would provide on-call project management support to the San Simeon Community Services District for capital improvement projects. This would include oversight of the permit compliance and reporting program per regulatory agency requirements to ensure the projects remain in compliance and on schedule. As necessary, Terra Verde would be available to assist with other project management tasks at request.
- **Task 4** – Providing environmental services following CEQA filings:
  - Terra Verde would provide post CEQA filing support on behalf of the San Simeon Community Services District including biological preconstruction surveys, environmental trainings, biological monitoring, and environmental compliance inspections and reporting. Further, Terra Verde would provide support and oversight of post project site stabilization activities and/or any required compensatory mitigation plan implementation and site restoration. This would include annual monitoring and reporting to ensure the restoration sites are meeting and/or exceeding performance criteria per permit conditions.



- **Task 5** – Implementation of environmental services and requirements for grants:
  - Terra Verde will provide support in grant application development and implementation following issuance. This would include but not be limited to the attendance of coordination meetings, biological surveys, waters and wetlands assessments, preparing and submitting agency permit applications, permit tracking and follow up support, site restoration plans, and compliance monitoring and oversight.

Deliverables may include biological resources constraints reports, biological resources assessment reports, waters and wetland delineation reports, site restoration plans, permit applications, agency correspondence, data files, compliance reports and annual monitoring reports. Terra Verde may also provide scope, cost, and timeline proposals for specific projects or tasks as needed.





## PROPOSED FEES

Terra Verde works hard to provide affordable rates for our clients while maintaining sound business principals and continuing to attract high quality employees.

Listed below are Terra Verde Billing Rates for 2022. These rates will remain in place for the duration of the three-year contract, if awarded.

### **TERRA VERDE ENVIRONMENTAL CONSULTING 2022 HOURLY BILLING RATES**

Principal	\$150.00/hour
Project Manager	\$135.00/hour
Assistant Project Manager	\$115.00/hour
Senior Wildlife Biologist/Botanist II	\$125.00/hour
Senior Wildlife Biologist/Botanist	\$105.00/hour
Mid Wildlife Biologist/Botanist	\$95.00/hour
Wildlife Biologist/Botanist	\$85.00/hour
Resource Specialist	\$75.00/hour
Technician	\$65.00/hour
GIS	\$95.00/hour
Administrative	\$50.00/hour
Mileage (billed at current government rate)	\$0.56/mile
4WD vehicle/day	\$100.00/day*
Digital camera	\$10.00/week*
Laptop computer	\$25.00/week*
Trimble GPS unit	\$100.00/day*
Cellular phone	\$75.00/month*
Ecological Scent-detection Dog	\$250.00/day
Other direct costs	Billed at cost
Subcontractors	Plus 15%
Per diem	Determined by region

\*These items are not billed for all projects



## REFERENCES

1. County of San Luis Obispo Public Works Department  
Keith Miller, Environmental Division Manager  
[klmiller@co.slo.ca.us](mailto:klmiller@co.slo.ca.us)  
Phone: (805) 781- 5714  
  
976 Osos St, Suite 207  
San Luis Obispo, CA 93408
2. City of San Luis Obispo Natural Resources Management Department  
Freddy Otte, Biologist  
[fotte@slocity.org](mailto:fotte@slocity.org)  
Phone: 805-781-7511  
  
990 Palm St.  
San Luis Obispo, CA 93401
3. City of Paso Robles  
Ditas Esperanza, Capital Projects Engineer  
[cipengineering@prcity.com](mailto:cipengineering@prcity.com)  
Phone: 805-237-3861  
  
1000 Spring Street  
Paso Robles, CA 93446



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## **BROOKE LANGLE, PRINCIPAL BIOLOGIST**

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### **EDUCATION**

B.S. Ecology and Systematic Biology – California Polytechnic State University, San Luis Obispo, 1995  
Certificate of Completion, Management Development for Entrepreneurs – UCLA Anderson School of Management, 2012  
Certificate of Completion, Minority Executive Business Program – University of Washington, Foster School of Business, 2019

### **PROFESSIONAL CERTIFICATIONS**

- California Department of Fish and Wildlife Scientific Collector’s Entity Permit #5592
- 40-hour Hazardous Waste Operations and Emergency Response Safety Certification, 2007; 8-hour refreshers annually

### **AREAS OF EXPERTISE**

Ms. Langle has project management and technical experience in the following areas:

- Regulatory permitting
- Biological and botanical surveys, habitat assessment, and monitoring
- Professional peer review
- Constructability assessment
- Habitat restoration
- California red-legged frog (*Rana draytonii*) site assessment, surveys, and monitoring
- Environmental compliance supervision, inspection, and monitoring for small to large-scale construction projects

### **REPRESENTATIVE EXPERIENCE**

Ms. Langle combines a strong background in environmental resource management with over 25 years of experience in conducting biological resources assessments, regulatory permitting, environmental inspection, biological monitoring, and environmental training. She has served as the Environmental Compliance Supervisor (ECS) for numerous projects over the last decade, including a number of large Pacific Gas & Electric Company (PG&E) electric transmission projects. Ms. Langle has managed Terra Verde’s on-call contracts with both the City and County of San Luis Obispo Public Works and Planning Departments. Ms. Langle’s responsibilities include project management and supervision, while retaining a strong involvement in fieldwork as a biologist. Her work experience covers a large portion of diverse areas in the western United States.

### **RELEVANT CURRENT PROJECTS:**

#### **County of San Luis Obispo (County) – On-call Environmental Services Planning and Building Department (June 2008 – Present)**

Terra Verde has been issued successive on-call contracts to provide environmental support services to the Environmental Division of the County Planning and Building Department. Ms. Langle has been the project manager for this contract. Scopes of services include regulatory assistance, including National Environmental Policy Act and/or California Environmental Quality Act compliance, biological and botanical surveys, and compliance monitoring. Additionally, Terra Verde has conducted numerous peer reviews of biological documents and provided assistance in revising the County’s guidelines for biological work. Ms. Langle has also assisted with planning and hosting the annual workshop hosted by the County for the environmental consultants pre-approved for work within San Luis Obispo County.

#### **City of San Luis Obispo – On-call Environmental Services (June 2008 – Present)**

Terra Verde has been issued successive two year on-call contracts to provide environmental and archaeological services for the City of San Luis Obispo. Scope of services include permitting assistance, biological and botanical surveys, compliance monitoring, as well as archaeological services provided by subcontractor Applied EarthWorks. Under this contract, Terra Verde staff conducted a wildlife assessment of Reservoir Canyon Natural Reserve, including habitat mapping, fisheries assessment, California red-legged frog surveys, avian surveys, small mammal trapping, and herpetological studies. Ms. Langle and Principal Biologist Brian Dugas led this effort which included hands-on training for Cal Poly students. Terra Verde has also provided biological assessments of City-managed open spaces including Terrace Hill, Bishop’s Peak, Laguna Lake, Irish Hills, Cerro San Luis, and Miossi Ranch.

#### **Zayo Group – JUS Diversity Fiber Optic Project (June 2018 – Present)**

Terra Verde is assisting Zayo Group with the planning and permitting for various fiber optic projects in and around Los Osos and Morro Bay, California. Ms. Langle is the project manager and lead biologist for overseeing the habitat assessment, biological



resources assessment development, and permitting strategy. Key resources include Morro shoulderband snail (*Helminthoglypta walkeriana*), California red-legged frog, steelhead, and western pond turtle. Ms. Langle is also managing the archaeological subcontractor for this project, Applied EarthWorks. Ms. Langle is the key point of contact for permitting coordination with the County of San Luis Obispo and other regulatory agencies.

**Small Wilderness Area Protection (SWAP) – Elfin Forest Biological Assessment (June 2018 – September 2019)**

Terra Verde was hired to update the biological assessment for the Elfin Forest in Los Osos, California. Ms. Langle was the project manager responsible for oversight of all botanical and biological work, including review of the technical report and recommendations. The project site is critical habitat for Morro shoulderband snail and home to many sensitive plant species.

**PG&E – Environmental Compliance Management Plan Support (December 2016 – Present)**

Ms. Langle is currently supporting PG&E's management team with implementation and consistency of the Environmental Compliance Management Plan on a number of active construction projects. Tasks include reviewing environmental inspector and specialty monitor reports in PG&E's web-based Field Reporting System, providing feedback to PG&E Land Planners and their consultant teams, providing support for compliance level determinations, and training for consistency of reporting.

**PG&E – Diablo Canyon Power Plant On-call Environmental Support (February 2010 – Present)**

Ms. Langle has managed a variety of projects at Diablo Canyon Power Plant including regulatory permitting, habitat restoration, restoration monitoring and reporting, storm water compliance, biological and botanical surveys, and environmental compliance inspections. Due to the highly confidential nature of this work, no further details are provided.

**Various – Private Clients, San Luis Obispo County, CA – Botanical and Biological Resources Assessments (August 2008 – Present)**

As qualified biologists and botanists that have been pre-approved for work within San Luis Obispo County, Terra Verde has been hired to provide biological and/or botanical consulting services to numerous private landowners seeking permits from the County. Projects have ranged from North County to South County, including the eastern portion of San Luis Obispo County. Ms. Langle has been involved in conducting research and field work, as well as technical writing, regulatory permitting, and project management.

**Cannon Associates – On-call Master Services Agreement (August 2007 – Present)**

Terra Verde, led by Ms. Langle, has been retained by Cannon Associates to provide environmental consulting services in support of their projects. Work has included constraints analysis, habitat assessments, and obtaining permits from regulatory agencies.

**PG&E – Diablo Canyon Power Plant Restoration Projects – Avila Beach, CA – Restoration Ecologist (October 2006 – 2012); Security Upgrade Project (March 2011 – 2014); Permitting Support (January 2015 – Present)**

Terra Verde has assisted PG&E with numerous projects at Diablo Canyon Nuclear Power Plant, including permitting assistance, restoration oversight, storm water inspection and reporting, and biological monitoring during construction of facility upgrades at the plant. As part of this contract, Ms. Langle received extensive training and was authorized for access into the Protected Area. Restoration duties included soliciting bids from restoration contractors, oversight during planting and field work, regular monitoring and reporting, and providing remedial recommendations to ensure the success of the restoration projects.

**RELEVANT PAST EXPERIENCE:**

**PG&E – Carrizo to Midway 230 kV Reconductoring Project – San Luis Obispo and Kern Counties, CA – Environmental Compliance Supervisor, Biologist (July 2011 – September 2017)**

Ms. Langle was the project manager/ECS for this 35-mile reconductoring project in San Luis Obispo and Kern Counties. Her duties included overall management of the budget, schedule, and staffing of Terra Verde staff as well as subcontractors. Ms. Langle assisted PG&E in coordination with regulatory agencies and provided weekly and monthly compliance reports. Additionally, she supported PG&E in coordinating with the two solar farm developers to ensure compliance. Ms. Langle oversaw the project's restoration monitoring and reporting until successfully signed off in 2017.



**PG&E – Master Services Agreement (2010 – 2016)**

Ms. Langle managed a master services agreement with PG&E beginning in 2010. Numerous projects were awarded under this contract, including an environmental compliance audit of PG&E's Crane Valley Dam Project; environmental compliance management of the Carrizo to Midway, Atascadero to San Luis Obispo, Shepherd Substation, and Contra Costa to Moraga Electric Projects; Distribution Support Services for project managed work; constructability analysis; and a number of archaeological projects by our subcontractors. Ms. Langle held the position of ECS for the compliance projects listed above.

**PG&E – Contra Costa to Moraga 230kV Reconductoring Project – East Bay Area, CA – Environmental Compliance Supervisor (May 2014 – December 2016); Vaca-Dixon to Lakeville 230kV Reconductoring Project – Yolo and Napa Counties, CA – Project Manager (January 2014 – December 2016)**

Ms. Langle led a constructability review for these projects, including an assessment of mitigation measures, a red-amber-green based constraints matrix, schedule planning based on constraints, and a summary report detailing findings of the review. She also acted as ECS for the Contra Costa to Moraga Project during construction, overseeing a team of environmental inspectors, biologists, and archaeologists.

**PG&E – Shepherd Substation Project – Fresno County, CA – Environmental Compliance Supervisor, Biologist (September 2013 – April 2016)**

Ms. Langle was the project manager/ECS for this new substation, transmission line, and distribution line project in Fresno County. Her duties included overall management of the budget, schedule, and staffing of Terra Verde staff as well as subcontractors. She was heavily involved in daily tracking of project issues and ensuring environmental compliance with all project requirements. Ms. Langle assisted PG&E in coordination with regulatory agencies and provides weekly and monthly compliance reports. She regularly interacted with the California Public Utilities Commission project manager and third-party monitoring team.

**County of San Luis Obispo – On-call Environmental Services Public Works Department (June 2008 – October 2014)**

Terra Verde was issued successive three year on-call contracts to provide environmental support services to the Public Works Department. Ms. Langle has been the project manager for this contract. Services include biological assessments, biological monitoring, California red-legged frog surveys, and oversight of specialty subcontractors for paleontological services and Morro Bay kangaroo rat (*Dipodomys heermanni morroensis*) protocol-level surveys.

**PG&E – Atascadero to San Luis Obispo Reconductoring Project – San Luis Obispo County, CA – Project Manager (March 2011 – January 2014)**

Terra Verde provided environmental inspection, biological surveys, and assistant project management on this San Luis Obispo County reconductoring project. Ms. Langle's duties include project management, oversight of Terra Verde staff conducting nesting bird and California red-legged frog surveys, rare plant collection and propagation, reporting, and environmental training.

**County of San Luis Obispo Public Works Department – Meadow Creek Lagoon Biological Assessment – San Luis Obispo, CA – Assistant Project Manager (January 2012 – April 2013)**

Terra Verde competed for and successfully secured the contract to conduct a biological assessment of the Meadow Creek (Oceano) Lagoon. The work provided a baseline for the County in addressing severe flooding issues that occur in this area. Ms. Langle assisted with project management and overall support for this work, including conducting California red-legged frog surveys.

**San Diego Gas & Electric Company – Sunrise Powerlink Project; Burns and McDonnell – Imperial and San Diego County, CA – Project Manager (April 2011 – September 2011)**

Ms. Langle oversaw biological staff during construction of a 117-mile, 500kV electric transmission line from Imperial County to San Diego. Primary duties of Terra Verde staff were avian surveys and monitoring, clearance surveys, and support to the Burns and McDonnell environmental compliance team.

**Padre – Chevron Guadalupe Dunes Restoration Project – Guadalupe Dunes, CA – Botanist, Biologist (August 2007 – August 2011)**

Ms. Langle worked with a team of botanists and biologists during the remediation of a 2,800-acre coastal dune ecosystem. Duties included surveys for rare and sensitive plants; line-transect botanical surveys of restoration sites as well as future disturbance sites; monitoring of construction crews during remediation activities; assisting in identification and collection of native seed; and other restoration activities including seeding, planting, and assisting with the preparation of quarterly environmental monitoring reports. Biological work included numerous eyeshine surveys for California red-legged frog as well as capture and relocation of a number of wildlife species, including California red-legged frog. Ms. Langle played a key role in reviewing and editing the Quarterly



#### Environmental Monitoring Reports.

During her last two years on this project, Ms. Langle played a key role by providing support to the Guadalupe Restoration Project Ecological Coordinator. She regularly helped with negotiations and conflict resolution with the County's third-party On-site Environmental Coordinator. She led the effort in resolving the challenge presented by the U.S. Fish and Wildlife Service suggesting that the El Segundo blue butterfly (*Euphilotes battoides allyni*) may occur on the property and should be addressed by Chevron. Ms. Langle also assisted in research to help guide which entity may assume ownership of the property once the site is finished with remediation.

#### **Sempra Global – Cameron Interstate Pipeline and LNG – Sulphur, LA – Environmental Compliance Supervisor (June 2007 – December 2009)**

Ms. Langle was retained by Sempra Global to act as ECS during the planning and construction of a new 36.5-mile 42-inch natural gas pipeline and associated liquefied natural gas plant in southwestern Louisiana. Duties include preconstruction planning for numerous wetland and waterbody crossings, preparation and presentation of an environmental training program (four-hour supervisor level training and daily crew training), oversight of two environmental inspectors throughout construction, coordination with construction management, contractors, and regulatory agencies to ensure compliance with the Federal Energy Regulatory Commission Certificate and other permits, and resolution of compliance issues.

#### **Federal Energy Regulatory Commission – Environmental Training Seminars – National – Instructor (2005 – 2007)**

Ms. Langle served as a key instructor for the FERC Post-certificate Environmental Compliance Seminar for natural gas industry professionals at locations throughout the U.S. The Post-certificate Environmental Compliance Seminar discussed compliance management techniques reflecting recent regulatory changes and industry advances.

#### **Castaic Lake Water Agency – Sand Canyon Pipeline and Reservoir Project – Santa Clarita, CA – Project Manager (2004 – 2006)**

Ms. Langle oversaw biological monitoring of a 5-mile, 48-inch-diameter water pipeline and 7-million gallon reservoir project. Her duties included scheduling, staffing, and client coordination. She worked with the contractor and construction management personnel to troubleshoot difficult construction techniques combined with challenging regulatory permit requirements. Ms. Langle also coordinated with regulatory agencies regarding potential water quality impacts to the impaired Santa Clara River.

#### **EnCana – Wild Goose Gas Storage Expansion Project – Butte and Colusa Counties, CA – Project Manager, Lead Environmental Inspector (2003 – 2005)**

Ms. Langle oversaw the installation of a new 30-mile natural gas pipeline, constructed primarily in giant garter snake (*Thamnophis gigas*) habitat. She evaluated the extensive dewatering operations and assisted the contractor in troubleshooting dewatering issues. Ms. Langle assisted in coordination with numerous resource agencies to resolve constructability and variance issues, and she participated in the preparation and presentation of supervisor-level and daily crew environmental training programs. She provided project management for postconstruction restoration and reporting. Ms. Langle conducted biological and botanical resource work for a feasibility study, alternatives analysis, Proponent's Environmental Assessment, and permit applications. She coordinated with resource agencies and the third-party monitoring team. She also conducted winter bird, nesting bird, and vegetation surveys for postconstruction monitoring of wetland creation and enhancement sites.

#### **Kinder Morgan Pipeline Company – Sacramento to Concord Replacement Project – CA – Lead Environmental Inspector (2004)**

Ms. Langle provided environmental inspection during installation of 70 miles of a 20-inch products pipeline. She focused on environmental compliance of several spreads and a large workforce with stringent regulatory requirements. Ms. Langle presented supervisor-level and crew training programs. She assisted in biological surveys and monitoring of sensitive species. She also oversaw the installation of erosion and sediment controls, as well as ongoing dewatering activities. Ms. Langle coordinated with California State Lands Commission staff and the third-party agency monitors, as well as specialty monitors, including biologists, paleontologists, archaeologists, and hazardous materials technicians.

#### **Kern River Gas Transmission Company – 2003 Expansion Project – UT/NV – Lead Environmental Inspector (2002 – 2003)**

Ms. Langle oversaw environmental compliance on 150 miles of the project. She supervised several environmental inspectors and resource specialists throughout the project, including a large staff of desert tortoise biologists. She assisted in verification of wetland delineations and noxious weed zones, including oversight of exclusion fencing and flagging. She coordinated with agency, third-party monitor, and construction personnel, particularly to resolve noncompliance issues and to identify and process numerous project



variances. Ms. Langle also conducted supervisor-level and daily crew environmental training programs.

**County of San Luis Obispo – Lopez Dam Seismic Retrofit – San Luis Obispo County, CA – Project Manager (2001 – 2002)**

Ms. Langle oversaw environmental compliance management during a seismic retrofit of an existing earthen dam. Key resources included California red-legged frog, steelhead (*Oncorhynchus mykiss irideus*), western pond turtle (*Actinemys marmorata*), oak tree (*Quercus agrifolia*), coastal scrub protection, and protection of water quality. She relocated sensitive species, primarily California red-legged frog and steelhead, from construction areas. She oversaw preconstruction surveys and flagging of sensitive resources, including coastal oak woodland. Ms. Langle supervised the environmental monitoring program during construction activities. She coordinated with County consultants and contractors regarding schedules, compliance, and conflict resolution.

**Santa Barbara County Public Works Department – On-call Environmental Services – Santa Barbara County, CA – Lead Biologist (2001 – 2002)**

Ms. Langle conducted surveys and environmental monitoring for public works projects. Her tasks included general surveys for sensitive species such as the California red-legged frog, western pond turtle, and southern steelhead; report preparation; mitigation and restoration recommendations; and environmental inspection during construction activities in sensitive areas. She was approved by the U.S. Fish and Wildlife Service to survey, handle, and relocate California red-legged frogs for this project. Ms. Langle also conducted crew environmental training in the field.

**Williams Communications – Fiber Optic Installation Project – Bakersfield to San Luis Obispo, CA – Lead Environmental Inspector (2000 – 2001)**

Ms. Langle managed the environmental inspection on two of four spreads for the installation of approximately 141 miles of underground fiber optic cable. She oversaw up to 11 environmental, cultural, and paleontological specialists and provided project daily crew environmental training and performed surveys for sensitive species, including California red-legged frog and nesting raptors, prior to construction activity. Ms. Langle received field training on the identification and habitat of Kern mallow (*Eremalche parryi* ssp. *kernensis*). She coordinated directly with agency representatives from the California Public Utilities Commission and she problem-solved potential noncompliance issues with construction inspectors, contractors, Native American, cultural, and paleontological monitors. She provided daily and weekly reports, as well as noncompliance, noncompliance resolution reports, and variance requests.

**Essex Environmental for Central Coast Water Authority – Mission Hills and Santa Ynez Extensions and Coastal Branch, Phase II – Kern and San Luis Obispo Counties, CA – Associate Biologist, Environmental Inspector (1999)**

Ms. Langle performed annual revegetation surveys on completed pipeline alignment. She performed plant identification, determined percent cover of desirable species compared to undesirable species, collected data from transects, and managed recommendations to achieve performance criteria.

**Garcia and Associates for Department of Water Resources – California State Water Pipeline Project – Kern and San Luis Obispo Counties, CA – Environmental Monitor (1996 – 1997)**

Ms. Langle inspected for environmental compliance during construction of the California State Water Pipeline. She performed surveys of coastal streams for California red-legged frogs and trained other biological monitors in identification and protection measures for the California red-legged frog. She assisted in rare plant surveys, and monitored riparian areas, prepared documentation of noncompliance issues, and made recommendations for revegetation and erosion control. She also monitored extensive hydrotest water discharges to ensure protecting of water quality and aquatic species.

**Self-employed – Black Lake Golf Course Expansion Project – San Luis Obispo County, CA – Environmental Monitor (1995 – 1997)**

Ms. Langle inspected for environmental compliance during construction and revegetation of an 80-lot subdivision and additional nine holes to an existing golf course. She enforced compliance of mitigation measures per the County requirements. She dealt with in situ mitigation for a federally endangered plant found during construction. Ms. Langle coordinated between the County, developers, engineers, arborists, contractors, and subcontractors. She monitored tree removals and revegetation, and documented compliance and noncompliance items.



**National Biological Service – California red-legged frog surveying – San Simeon, CA – Volunteer Biologist (1995 – 1997)**

Ms. Langle conducted surveys along coastal streams of California for red-legged frogs prior to listing. She performed night eyeshine surveys, radio tracking, and hand-held scanning of previously tagged animals. She inserted microchip or radio tags on first-time captured frogs. She captured, installed PIT tags, and recorded physical characteristics of red-legged frogs.

**Self-employed for California Polytechnic State University – California State Water Pipeline – San Luis Obispo, CA – Biologist, Environmental Inspector (1996)**

Ms. Langle inspected for environmental compliance during pipeline work crossing the university property. She coordinated with other biologists and arborists, state regulatory agencies, and university management to ensure sensitive resources were protected.

**SPECIALIZED TRAINING**

- Wildlife Society San Joaquin Kit Fox Workshop, Carrizo Plain 2014
- Acoustic Bat Monitoring Workshop presented by The Wildlife Society, 2013
- County of San Luis Obispo, Annual training for biologists, 2007 – 2016
- Wildlife Society, Ecology of Bats workshop, Carrizo Plain 2009
- California Native Plant Society – Rare and sensitive plants of San Luis Obispo County, May 2009
- Wildlife Society Conference, Annual
- California Tiger Salamander Workshop presented by The Wildlife Society, 2003
- Identification and ecology of sensitive amphibians and reptiles of the central and southern Sierra Nevada (presented by the Western Section of The Wildlife Society), 2001

**PROFESSIONAL AFFILIATIONS**

- Part-time lecturer, Cal Poly Natural Resources Management Spring 2009 – 2011; 2016 – 2017; 2019-2020
- The Wildlife Society, Central Coast Chapter President 2009 – 2013; Member 1998 – Present
- Land Conservancy Board Member July 2010 – 2018; President of the Board of Trustees 2016 – 2018

**SELECTED PRESENTATIONS**

Langle, B. "Survival of the fittest: the evolution of mitigation measures from the keyboard to the construction site." *Association of Environmental Professionals*, San Francisco, CA. 2003.

Langle, B. "How to evaluate effective mitigation and monitoring conditions." *Association of Environmental Professionals*, Monterey, CA. 2002.

Langle, B. "Review of a successful compliance project." *Wildlife Society Annual Conference*. 2000.





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**BRIAN DUGAS, PRINCIPAL BIOLOGIST**

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**EDUCATION**

M.S. Agriculture, emphasis in Fisheries and Wildlife Management – California Polytechnic State University, San Luis Obispo, 2009  
B.S. Natural Resources Management, California Polytechnic State University, San Luis Obispo, 1993

**PROFESSIONAL CERTIFICATIONS**

- 40-hour Hazardous Waste Operations and Emergency Response certification, 1995; 8-hour refreshers
- Certified Professional in Erosion and Sediment Control #6727
- California Department of Fish and Wildlife (CDFW) Scientific Collector's Entity Permit #5592

**AREAS OF EXPERTISE**

Mr. Dugas has project management and technical experience in the following areas:

- Biological and botanical surveys, habitat assessments, and monitoring
- Regulatory agency permitting
- California Environmental Quality Act/National Environmental Policy Act (CEQA/NEPA) compliance
- Environmental compliance for small- to large-scale construction projects
- Jurisdictional determinations and wetland assessments
- Habitat restoration
- Fisheries assessments

**REPRESENTATIVE EXPERIENCE**

Mr. Dugas has over 25 years of experience conducting biological assessments, regulatory agency permitting, and environmental compliance for a wide variety of projects with emphasis on former oil and gas facility decommissioning and public utility improvement projects. Mr. Dugas' responsibilities have included: biological resources assessments, wetland delineations, permitting, monitoring, compliance and training; habitat restoration, monitoring, and reporting; land use planning, preliminary site assessment, environmental impact analysis, and development of site-specific mitigation strategies; special-status species site assessments, surveys, and monitoring including fisheries assessments; and environmental inspection and technical document preparation, including mitigated negative declarations and environmental impact reports per CEQA guidelines.

**TERRA VERDE ENVIRONMENTAL CONSULTING CURRENT PROJECTS:**

**City of Pismo Beach –Bello Street Bridge Replacement Project – Pismo Beach, CA – Principal Biologist (May 2020 – Present)**

Terra Verde is currently providing environmental services for the replacement of an existing steel truss bridge with a concrete slab bridge over Pismo Creek located in Pismo Beach, California. Mr. Dugas is the project manager, and his duties include leading pre-activity fisheries surveys for steelhead (*Oncorhynchus mykiss*) and tidewater goby (*Eucyclogobius newberryi*) in coordination with Kisner Restoration and Ecological Consulting, Inc., budget management; ensuring timely compliance reporting; scheduling and managing Terra Verde biologists. As part of his duties, Mr. Dugas is regularly coordinating with the resident engineer (MNS Engineers, Inc.) as well as the contractor foreman to effectively resolve compliance issues.

**Creek Lands Conservation – Lower San Luis Obispo Creek Fish Passage Design and Habitat Improvement Project – San Luis Obispo County, CA – Principal Biologist (2020 – Present)**

Mr. Dugas is currently serving as Principal Biologist for the Lower San Luis Obispo Creek Fish Passage Design and Habitat Improvement Project which involves enhancement of fish migration, specifically adult steelhead and lamprey, by modifying the existing fish passage structure at the Marre Weir. As part of this effort, Mr. Dugas is supporting the Technical Advisory Committee in the current design alternatives analysis and provided oversight of all biological surveys and preparation of a Biological Resources Assessment which will be used to support the regulatory agency permitting process. In addition, Mr. Dugas is leading the development of a focused site restoration plan with emphasis in restoring all wetland and riparian areas to be temporarily disturbed with implementation of the selected fish passage design alternative.

**Pacific Gas & Electric Company (PG&E) – Pecho Berm Removal – San Luis Obispo County, CA – Principal Biologist (2015 – Present)**

Mr. Dugas is currently serving as Principal Biologist for the Pecho Berm Removal Project which involved the removal of a 40-year-old earthen berm from the bed and banks of Pecho Creek within Diablo Canyon Power Plant property. As part of this effort, Mr. Dugas provided oversight of all biological surveys as well as the preparation of an agency-approved site stabilization and riparian habitat

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*Brian Dugas, Principal Biologist*



restoration plan (Restoration Plan). In addition, Mr. Dugas led the permitting support efforts which included close correspondence with regulatory permitting agencies prior to final permit acquisition. In addition, Mr. Dugas provided oversight of all biological monitoring during berm demolition and stream recontouring and implementation of the Restoration Plan. The restoration site is currently on track to meet success criteria by the end of the monitoring period.

**RELEVANT PAST EXPERIENCE:**

**County of San Luis Obispo Public Works – Prefumo Canyon Road Slip Out Repair Project – San Luis Obispo, CA – Principal Biologist (September 2020)**

Mr. Dugas served as principal biologist on behalf of the County of San Luis Obispo during a creek bank repair project along Prefumo Canyon Road. Responsibilities included support of County staff during preconstruction surveys for special status species including CRLF and steelhead, as well as relocation efforts during dewatering and initial construction activities. Duties included working with County staff in identifying suitable CRLF and steelhead relocation areas upstream of the project site and reviewing daily compliance monitoring reports from field staff.

**County of San Luis Obispo Public Works – Estrella Bridge Rehabilitation Project – Paso Robles, CA – Principal Biologist (June 2019 – March 2020)**

Terra Verde provided environmental services for the rehabilitation of a historic truss bridge on River Road over the Estrella River in the community of Whitley Gardens. Mr. Dugas was the project manager and his duties included pre-activity surveys, budget management; ensuring timely compliance reporting; scheduling and managing Terra Verde biologists. Mr. Dugas regularly coordinated with the County of San Luis Obispo project manager, contractor foreman and MNS Engineers, Inc. to resolve compliance issues and ensure a successful project.

**County of San Luis Obispo Public Works – Geneseo Bridge Project – Paso Robles, CA – Principal Biologist (July 2019 – March 2020)**

Terra Verde provided environmental services for the construction of a concrete slab bridge within an existing low water crossing of the west branch of the Huer Huero Creek in the community of Creston. Mr. Dugas was the project manager for this project and his duties included periodic site inspections/surveys; budget management; ensuring timely compliance reporting; scheduling and managing Terra Verde biologists; as well as the project archaeologist team. Mr. Dugas regularly coordinated with the County of San Luis Obispo project manager, contractor foreman, MNS Engineers, Inc. and the cultural monitors to effectively ensure a successful project.

**County of San Luis Obispo Public Works – Oceano Lagoon Bridge Replacement Project – Oceano, CA – Principal Biologist (August 2018 – June 2019)**

Terra Verde provided environmental services for the replacement of an existing timber bridge with a concrete slab bridge over the Oceano Lagoon located in Oceano, California. Mr. Dugas was the project manager for this project and his duties included leading pre-activity fisheries surveys in coordination with Kisner Restoration and Ecological Consulting, Inc., budget management; ensuring timely compliance reporting; scheduling and managing Terra Verde biologists. Mr. Dugas regularly coordinated with the County of San Luis Obispo project manager and resident engineer as well as the contractor foreman to effectively resolve compliance issues. Further, Mr. Dugas supported the County of San Luis Obispo with oversight of giant reed removal efforts within the lagoon as required per the restoration plan.

**PG&E – On-call Support for Distribution and Shared Services – Principal Biologist (2013 – 2018)**

Mr. Dugas has served as Senior Biologist for all on-call support services and technical assessment evaluations, discretionary permitting, and compliance services for the PG&E Distribution and Shared Services Program (including electrical and natural gas facilities) since 2013. The projects have generally been located within PG&E's Central Coast service areas. Specifically, Mr. Dugas provided oversight of desktop-level and field reconnaissance surveys, California Natural Diversity Database searches, field walkdowns with design and construction teams, biological resources surveys, and permitting assessments. Mr. Dugas has continued this role on behalf of Terra Verde per recently issued 2016 contracts to support various environmental consulting firms for environmental services of PG&E's Gas and Electric Distribution project-managed jobs.

**MidAmerican Solar – Topaz Solar Farm – San Luis Obispo County, CA – Principal Biologist (2015 – 2018)**

Terra Verde provided monitoring of the restoration, revegetation, and wildlife use of a 550-megawatt solar photovoltaic power-generating facility located in eastern San Luis Obispo County. Mr. Dugas provided oversight of all field operations including quarterly qualitative and biannual quantitative assessments of vegetation growth as well as additional restoration efforts to meet performance

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*Brian Dugas, Principal Biologist*



criteria within the 4,700-acre project site. Mr. Dugas was responsible for providing quality assurance/quality control of all data analysis, report preparations and submissions, budget tracking, and ensuring adherence to all site safety protocols.

**County of Santa Barbara – Jalama Road Bridge Widening Project – Santa Barbara County, CA – Biologist (May 2016 – February 2017)**

Mr. Dugas was the project manager for this County of Santa Barbara Public Works Department project. He was responsible for scheduling, budget, and staff oversight, including assisting with coordination with regulatory agencies regarding permit amendments. He reviewed the environmental training program, daily reports, and assisted with finalizing the postconstruction report.

**County of San Luis Obispo – Price Canyon Road Widening Project – San Luis Obispo, CA – Project Manager (May 2016 – November 2017)**

Mr. Dugas was the project manager for this County of San Luis Obispo Public Works Department project. His duties included managing the budget; ensuring timely compliance reporting; scheduling and managing Terra Verde biologists and botanists; and coordinating with resource specialists, engineers, and contractors to resolve compliance issues. Mr. Dugas regularly coordinated with the County of San Luis Obispo project manager, resident engineer, and other key staff.

**PG&E – Atascadero to San Luis Obispo 70kV Reconductoring Project – San Luis Obispo County, CA – Environmental Compliance Supervisor (2011 – 2016)**

Mr. Dugas served as Terra Verde's Environmental Compliance Supervisor in support of a 15.5-mile transmission line reconductoring project. This project was located in San Luis Obispo County, and traverses residential areas, private ranch land, and San Luis Obispo City open space. Tasks included environmental compliance management, environmental inspection, environmental training, regionally-specific terrestrial biology, cultural and paleontological resources monitoring, sensitive plant mitigation, and site restoration. Natural vegetation communities being restored include: oak woodland, oak savannah grassland, coastal sage scrub, and mixed chaparral. Rare plant populations were also restored and were monitored as part of the annual monitoring efforts. All performance criteria were achieved for regulatory agency approval.

**City of San Luis Obispo Public Works Department – Toro and Broad Street Bank Stabilization Projects – San Luis Obispo, CA – Project Manager (2014 – 2015)**

Mr. Dugas managed all permitting support efforts provided to the City of San Luis Obispo for two stream bank stabilization projects located in San Luis Obispo and Old Garden Creeks. Project tasks included performing initial site assessments; identifying and mapping jurisdictional boundaries; plan review; and preparation of U.S. Army Corps of Engineers, Regional Water Quality Control Board (RWQCB), and CDFW permit applications. Mr. Dugas supported City of San Luis Obispo staff throughout the permitting phase until final permit acquisition. This included regular correspondence with agency staff including formal consultation with National Oceanic and Atmospheric Administration Fisheries to address project impacts to southern steelhead (*Oncorhynchus mykiss irideus*) and development of detailed dewatering plans for each project per RWQCB specifications.

**City of San Luis Obispo – Laguna Lake, Terrace Hill, and Bishop Peak Biological Assessments – San Luis Obispo, CA – Project Manager (2014 – 2015)**

Terra Verde conducted focused botanical and wildlife surveys of Laguna Lake, Terrace Hill and Bishop Peak on behalf of the City of San Luis Obispo in support of their open space and conservation plan updates. Mr. Dugas managed all survey and reporting efforts which included completion of thorough floristic inventories, plant community mapping, and general wildlife surveys. All rare plant populations and sensitive wildlife species occurrences were mapped using hand-held GPS units. The Bishop Peak survey included deployment of game camera stations and an acoustical bat detector for several nights. The results of the surveys included comprehensive vascular plant and wildlife lists and detailed plant community and sensitive species occurrence maps.

**PG&E – Jolon Substation Expansion Project – Jolon, CA – Principal Biologist (2014 – 2015)**

Mr. Dugas served as project manager for the completion of a comprehensive biological resources assessment of the PG&E Jolon Substation Expansion project. The scope of work included completion a focused wildlife and spring botanical resources survey in addition to a California tiger salamander (*Ambystoma californiense*) habitat assessment. The combined studies and technical report included a series of recommended avoidance and minimization measures for protection of identified sensitive biological resources.

**PG&E – Carrizo to Midway 230 kV Reconductoring Project – San Luis Obispo and Kern Counties, CA – Principal Biologist (September 2011 – 2014)**

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*Brian Dugas, Principal Biologist*



Mr. Dugas served as Principal Biologist for this 35-mile reconductoring project in San Luis Obispo and Kern Counties. His duties included support of overall environmental compliance monitoring and reporting operations. As part of these efforts, Mr. Dugas conducted wetland assessments, supported biological field surveys, and assisted in project management duties.

**County of San Luis Obispo – Lopez Terminal Reservoir – San Luis Obispo County, CA – Principal Biologist (2012)**

Mr. Dugas led a series of protocol-level California red-legged frog (CRLF; *Rana draytonii*) surveys at the County of San Luis Obispo Lopez Terminal Reservoir. The survey work included numerous eyeshine surveys for CRLF using specialized watercraft and multiple survey teams to cover the entire reservoir and surrounding areas including two isolated ponds, and four settling ponds associated with the adjacent water treatment plant. CRLF were positively identified on the project. Survey results and findings provided County of San Luis Obispo staff the necessary technical information to complete required maintenance activities within the reservoir facility.

**County of San Luis Obispo – Meadow Creek Lagoon Area Project – San Luis Obispo County, CA – Principal Biologist (2011 – 2012)**

Mr. Dugas served as project manager for the completion of a comprehensive biological resources assessment for the County of San Luis Obispo Flood Control and Water Conservation District Meadow Creek (Oceano) Lagoon Area project. The scope of work included a focused fisheries/wildlife and botanical resources survey and wetland delineation. CRLF were positively identified on the project. The studies provided County of San Luis Obispo staff the necessary technical information to develop a series of project alternatives for prevention or reduction of flood water elevations.

**City of Paso Robles – South River Road Bike/Pedestrian Path Project – Paso Robles, CA – Biologist (2012)**

Mr. Dugas served as project manager of the biological monitoring team for the selected contractor, G. Sosa Construction, Inc. during construction of the South River Road Bike Path. Responsibilities included assisting with preconstruction surveys within the Salinas River corridor for special status species, including CRLF, western spadefoot toad (*Spea hammondi*), Monterey dusky-footed wood rat (*Neotoma macrotis luciana*), and nesting birds, and providing oversight for all biological monitoring efforts during construction activities.

**County of San Luis Obispo Planning Department – ConocoPhillips Nipomo Creek Erosion Prevention Project – Nipomo, CA – Lead Mitigation Compliance Monitor (August 2011 – April 2012)**

Terra Verde provided environmental compliance monitoring on behalf of the County of San Luis Obispo Planning Department during construction of a protective concrete block revetment system for permanent protection of subsurface contamination associated with an existing petroleum pipeline. Mr. Dugas' duties included participation in preconstruction special-status species surveys, implementing the environmental training program, inspection and monitoring of dewatering and stream diversion systems, coordination with construction management contractors and regulatory agencies to ensure compliance with project permits, and resolution of non-compliance issues.

**County of San Luis Obispo – San Simeon Bridges Creek Diversion – San Simeon, CA – Lead Biological Monitor (2011)**

While employed at Padre Associates, Inc., Mr. Dugas served as lead biological monitor on behalf of the County of San Luis Obispo during two creek diversions on San Simeon Creek along the northern coast of San Luis Obispo County. Responsibilities included assisting with preconstruction surveys for special status species, including CRLF and steelhead, leading a team of biologists during steelhead relocation during dewatering activities, and biological monitoring during construction activities. More than 80 young-of-the-year and juvenile steelhead were successfully relocated to an approved, off-site location under the direction of Mr. Dugas.

**Chevron Corporation – Guadalupe Dunes Restoration Project – Guadalupe Dunes, CA – Lead Biologist (2009 – 2011)**

While employed at Padre Associates, Inc., Mr. Dugas worked with a team of botanists and biologists during the remediation of a 2,800-acre coastal dune ecosystem. Duties included oversight of annual biological field survey and monitoring efforts including: rare and sensitive plant surveys, line-transect surveys of restoration sites, monitoring of construction crews during remediation activities, seeding and planting, and preparation of quarterly environmental monitoring reports. Biological work included eyeshine surveys for CRLF.

**Chevron Corporation – Estero Marine Terminal Decommissioning Project – San Luis Obispo, CA – Project Manager (2003 – 2011)**

While employed at Padre Associates, Inc., Mr. Dugas served as project manager and led a team of biologist in providing comprehensive permitting and biological consulting services in support of the Estero Marine Terminal Decommissioning Project. Mr. Dugas led numerous field surveys including a comprehensive biological survey, spring botanical surveys, focused CRLF survey, fisheries assessment, and beach and marine biological surveys. Additionally, Mr. Dugas developed the site restoration plan which included revegetation of a portion of Toro Creek as well as adjacent coastal sage scrub and coastal foredune habitat areas. Mr. Dugas provided

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*Brian Dugas, Principal Biologist*



oversight of all technical document preparation including a biological assessment in support of a regulatory agency permit applications.

**Unocal – Cojo Marine Terminal Decommissioning Project – Point Conception, CA – Project Manager, Restoration Ecologist (1998 – 2011)**

While employed at Padre Associates, Inc., Mr. Dugas served as project manager/restoration ecologist and led a team of biologists in providing comprehensive permitting and biological consulting services for the removal of the Cojo Marine Terminal and associated facilities located at Point Conception. The Cojo Marine Terminal and associated pipeline corridors were located within several sensitive habitat areas, which support several sensitive habitat areas and special-status species including CRLF and western pond turtle (*Actinemys marmorata*). Mr. Dugas led numerous field surveys including a comprehensive biological survey, spring botanical survey, herpetological survey, and beach and marine biological surveys. Additionally, Mr. Dugas developed a series of site restoration plans which included revegetation of perennial grassland, coastal sage scrub, and dune scrub habitat areas. Mr. Dugas provided oversight of all restoration efforts and led the required field monitoring events until performance criteria were achieved for regulatory agency approval.

**City of Paso Robles – Paso Robles City Hall Parking Lot Sulfur Springs Remediation Project – Paso Robles, CA – Biologist (2009 – 2010)**

While employed at Padre Associates, Inc., Mr. Dugas served as Senior Biologist for the biological assessment of the City Hall Parking Lot Sulfur Springs Remediation which involved the construction of a leach field percolation system at the City of Paso Robles Water Yard to discharge surfacing spring water to the underflow of the Salinas River. The biological assessment report was utilized in the Mitigated Negative Declaration prepared by the City of Paso Robles in support of the project. Further, Mr. Dugas led a series of preconstruction, biological surveys and worker orientations prior to project implementation.

**City of Paso Robles – Municipal Airport Taxiway Extension Project – Paso Robles, CA – Biologist (2009)**

While employed at Padre Associates, Inc., Mr. Dugas served as project manager and primary point of contact with Mr. Roger Oxborrow for completion of a focused San Joaquin kit fox (*Vulpes macrotis*) and vernal pool fairy shrimp (*Branchinecta lynchi*) habitat assessment in support of the airport expansion project. Responsibilities included correspondence with resource agencies, completion of the field survey/habitat assessment and preparation of the final report.

**Nipomo Community Services District – Wastewater Treatment Plant Upgrade Project – Nipomo, CA – Biologist (2009 – 2010)**

While employed at Padre Associates, Inc., Mr. Dugas led a focused, protocol-level CRLF survey of the proposed wastewater treatment plant expansion area in Nipomo, which included a series of existing treatment ponds and adjacent areas. No CRLF were observed, however, numerous adult and subadult western spadefoot toads were identified during the survey.

**Plains Exploration and Production Company – Produced Water Reclamation Facility Subsequent Environmental Impact Report – San Luis Obispo, CA – Project Manager (2007 – 2009)**

While employed at Padre Associates, Inc., Mr. Dugas served as project manager for the Plains Exploration and Production Company Water Reclamation Facility Subsequent Environmental Impact Report. The primary purpose of the project was to enhance the recovery of oil reserves via treatment and reuse of excess produced water associated with oil extraction operations at their Arroyo Grande Oil Field. This included proposed construction of several pipelines, a tempering pond, and an outfall to Pismo Creek to facilitate disposal of the treated water. Sensitive resources within the project area included Pismo clarkia (*Clarkia speciosa* subsp. *immaculata*), golden eagle (*Aquila chrysaetos*), western pond turtle, coast horned lizard (*Phrynosoma coronatum*), steelhead, maritime chaparral, coast live oak woodland, and jurisdictional wetlands. The Subsequent Environmental Impact Report addressed potential impacts that were anticipated to logically and foreseeably occur from project implementation. Where significant impacts were identified, the Padre team, led by Mr. Dugas, developed project-specific mitigation measures to reduce impacts to less than significant levels. As part of this process, Mr. Dugas worked with regulatory agencies in developing a series of feasible mitigation measures to mitigate both short- and long-term impacts to steelhead and associated habitat features within Pismo Creek.

**Chevron Corporation – Tank Farm Site Remediation Project – San Luis Obispo, CA – Biologist (2008)**

While employed at Padre Associates, Inc., Mr. Dugas led the necessary protocol-level surveys for CRLF at the San Luis Obispo Chevron Tank Farm site. The survey area included a portion of the east branch of San Luis Obispo Creek, Tank Farm Creek, and a series of perennial wetlands that occur throughout the site. Due to the lack of CRLF identification on site, a total of eight surveys were completed (3 days and 5 nights) per the *Revised Guidance on Site Assessments and Field Surveys for the California red-legged frog* (USFWS 2005). Mr. Dugas also performed the associated wetland assessment for this project.

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Brian Dugas, Principal Biologist



**County of San Luis Obispo – San Luis Bay Bridge Replacement Project – San Luis Obispo, CA – Biologist (2007)**

While employed at Padre Associates, Inc., Mr. Dugas led a series of preconstruction special-status species surveys which included protocol-level CRLF surveys of the proposed project area within San Luis Obispo Creek. Additional tasks included conducting a worker orientation on the identification of CRLF, and monitoring of vegetation removal within the drainage.

**Nipomo Community Services District – Waterline Intertie Project – Nipomo, CA – Biologist (2007 – 2009)**

The proposed pipeline corridor for this project included several drainages located in northern Santa Maria, the Santa Maria River, Nipomo Creek, and a series of wetlands located along the Nipomo Mesa. While employed at Padre Associates, Inc., Mr. Dugas led a focused biological resources assessment of the pipeline corridor which included protocol-level CRLF surveys of the entire project area. Numerous adult and sub-adult CRLF were identified, in addition to several other special-status species. Mr. Dugas collaborated with Nipomo Community Services District staff to develop a series of mitigation measure to reduce the potential impacts to CRLF and other special-status species.

**ExxonMobil – Las Flores Canyon Emergency Road Repair Project – Gaviota, CA – Biologist (2005 – 2006)**

While employed at Padre Associates, Inc., Mr. Dugas led focused herpetological surveys of project area and identified CRLF within Las Flores Canyon drainage and Venadito Creek. Coordination with the U.S. Army Corps of Engineers and U.S. Fish and Wildlife Service was necessary to develop appropriate avoidance and minimization measures for the project. Additionally, Mr. Dugas conducted pre-activity surveys and performed appropriate worker orientations at the site.

**Shell – Molino Flowline Removal Project at Arroyo Hondo Creek – Gaviota, CA – Project Manager, Restoration Ecologist (2000 – 2003)**

While employed at Padre Associates, Inc., Mr. Dugas served as project manager in providing comprehensive permitting and biological consulting services for the removal of oil and produced water pipelines (flowlines) associated with the Shell Molino Oil & Gas facility located within the Arroyo Hondo Ranch on the southern Santa Barbara County coast. The flowline corridor was located within the sensitive habitat area of Arroyo Hondo Creek, which supports a wide variety of special-status species including southern steelhead, tidewater goby (*Eucyclogobius newberryi*), and CRLF. Mr. Dugas assisted in development of alternative methodologies for flowline removal which aided in streamlining the overall permit process. Mr. Dugas prepared a detailed project description, and a site-specific restoration plan with emphasis on enhancement of available habitat for southern steelhead and other sensitive species. In addition, Mr. Dugas provided oversight of all biological monitoring during construction and implementation of site restoration plans.

**Santa Barbara County Flood Control District – West Canyon Drainage Improvement Project – Santa Maria, CA – Biologist (June 2003)**

While employed at Padre Associates, Inc., Mr. Dugas conducted focused, protocol-level CRLF surveys of the West Main Street drainage in Santa Maria, California. Numerous adult CRLF were identified during the survey.

**Chevron Corporation – Estero Hill Plant Sag Line Removal Project – Morro Bay, CA – Biologist (May 2003)**

While employed at Padre Associates, Inc., Mr. Dugas conducted wildlife surveys within the project area with specific emphasis on the presence of CRLF and/or existing suitable habitat within an intersecting drainage. Several adult CRLF were identified during the survey.

**City of Thousand Oaks – Phase 2 Sewer Interceptor Reconstruction Project – Thousand Oaks, CA – Biologist (May 2000)**

While employed at Padre Associates, Inc., Mr. Dugas worked with a team of biologists during focused preconstruction surveys for CRLF along a two-mile segment of Arroyo Conejo Creek located within the City of Thousand Oaks, California. Mr. Dugas participated as a biological monitor, which involved fish rescue and relocation of special-status reptiles during construction activities.

**Unocal – Guadalupe Beach A2A Emergency Excavation and Remediation Project – Guadalupe, CA – Biologist (1998)**

While employed at Padre Associates, Inc., Mr. Dugas participated in the monitoring (day/night) of the access routes and excavation areas throughout the project. During this period, Mr. Dugas conducted surveys with a team of biologists and observed as well as participated in numerous CRLF relocations. Using established handling protocols, all frogs observed were captured and relocated to a pre-determined suitable habitat area located outside the zone of disturbance. Mr. Dugas also accompanied U.S. Fish and Wildlife Service and California Department of Fish and Game biologists during several nighttime surveys of the wetland habitats within the project area. Mr. Dugas was involved in daily monitoring of the project site for biologically sensitive species, such as CRLF and western snowy plover (*Charadrius alexandrinus nivosus*).

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Brian Dugas, Principal Biologist



**MASTER'S THESIS**

Spatial, Seasonal, and Size Dependent Variation in the Diet of Sacramento Pikeminnow in the Main Stem of Chorro Creek, Central Coast California

**SPECIALIZED TRAINING**

- San Joaquin Kit Fox Workshop, California Central Coast Chapter of the Wildlife Society, October 2017
- TriCounty Fish Team, Snorkel Survey Training, May 2015
- Salmonid Restoration Federation Conference, March 2015
- Wetland Training Institute, Field Indicators of Hydric Soils, (8-hours), 2013
- Guadalupe Restoration Project – Site-specific California red-legged frog training, Jeff Alvarez, 2010
- California Tiger Salamander Workshop, Elkhorn Slough Research Reserve, 2009
- Wetland Training Institute, Wetland Delineator Certification Program (40 hours), 2006
- San Joaquin Kit Fox Habitat Evaluation Workshop, San Luis Obispo County, 2006

**PROFESSIONAL AFFILIATIONS**

- California Society for Ecological Restoration (SERCAL), Present
- Western Section of the Wildlife Society (TWS), Present
- Salmonid Restoration Federation (SRF), Present

**SELECTED PRESENTATIONS**

Dugas, B. "Avila Beach Community Services District, Marine Outfall Repair Project, Environmental Permitting Compliance." *American Public Works Association, Central Coast Chapter*, San Luis Obispo, CA. 2004.

Dugas, B. "Sacramento Pikeminnow Gut Content Analysis Project, Chorro Creek Watershed, San Luis Obispo, CA." *State of the Bay Conference*, City of Morro Bay. 2006.



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**ROBYN M. POWERS, SENIOR WILDLIFE BIOLOGIST**

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**EDUCATION**

M.S. Biology, emphasis in Wildlife Behavior and Physiology – San Francisco State University, California, 2009  
B.S. Environmental Science, University of Denver, Colorado 2000

**PROFESSIONAL CERTIFICATIONS**

- California Department of Fish and Wildlife Scientific Collecting Permit #10093
- OSHA 10-hour Outreach Training Program—Construction, 2016

**AREAS OF EXPERTISE**

Ms. Powers has project management and technical experience in the following areas:

- Protocol surveys for rare and endangered wildlife
- Surveys for wildlife using ecological scent-detection dogs
- Environmental compliance for large- and small-scale construction projects
- Pre-construction surveys, construction monitoring, and operational phase environmental compliance for large- and small-scale solar and wind sites
- Mammal ecology and population monitoring
- Large, meso, and small mammal trapping, handling, and radiotelemetry

**REPRESENTATIVE EXPERIENCE**

Ms. Powers is a broadly trained wildlife ecologist with more than 20 years of professional experience, with an emphasis on rare and endangered species surveys and research. She has valuable experience working with a variety of species, ranging from reptiles to large carnivores and from invasive to endangered species. Since 2013, Ms. Powers has served as a project manager and senior biologist for a variety of consulting projects on public, private, and military lands. For example, she has led survey and monitoring efforts at renewable energy facilities, for habitat conservation plans, for transportation projects, and for a variety of construction projects in California locales such as the San Joaquin Valley, Central Coast, Bay Area, and Channel Islands. Ms. Powers also managed a scent-detection dog program, is a trained detection dog handler, and owns two working dogs trained to detect San Joaquin kit fox scat and bird and bat fatalities.

**TERRA VERDE PROJECT EXAMPLES:**

**Tetra Tech / U. S. Navy – San Nicolas Island Fox Annual Demographic Grid-Trapping – San Nicolas Island, CA – Project Manager, Lead Biologist (Fall 2016 – Present)**

The San Nicolas Island fox (*Urocyon littoralis dickeyi*) population has been monitored annually since 2000. Ms. Powers participated in trapping efforts in 2003 and 2004, conducted a behavioral ecology study for her Master’s thesis from 2005 to 2006, and returned to the island in 2016 as the lead for the demographic trapping program. Ms. Powers manages all aspects of the project, such as Navy coordination; scheduling and planning; supply procurement and delivery to the island; training of staff; safety protocol development and implementation; data management, quality control, and analysis; troubleshooting challenges and advising on solutions; and preparation of annual reports and all other deliverables. She is the field lead for trapping and handling island foxes, which includes hiking and hauling traps over steep terrain; assessing the health and condition of each captured fox; collecting blood and other biological samples; fitting radio collars to selected foxes; vaccinating selected foxes for rabies virus and canine distemper virus; maintaining detailed records of fox captures; and presenting data in a detailed annual report.

**Private Developers – Biological Resources Assessments – San Luis Obispo County, CA – Project Manager, Biologist (2019 – Present)**

Ms. Powers manages projects for and/or surveys properties in San Luis Obispo County proposed for development to create Biological Resources Assessments that satisfy County requirements for recordation of baseline biological resources. This involves consulting various biological databases managed by environmental resource agencies, scientific literature reviews, assessment of habitats in and around the proposed project sites, assessment of suitability for sensitive species, waters and wetland delineations, plant and wildlife inventories, and recommendations to avoid and minimize damage to special-status species and habitats. A consolidated report in the County-approved format is prepared and used to inform the environmental permitting process. When oak trees or other sensitive species or habitats are found on site, Ms. Powers prepares a mitigation plan for approval by the County so the owner may compensate for impacts to sensitive resources. Ms. Powers has managed these projects for a diversity of clients, such as owners of vineyards and

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*Robyn Powers, Senior Biologist*





wineries, residential developers, and cannabis farms in all areas of the County.

**Wallace Group – Oak Shores Construction Compliance and Mitigation Implementation – Lake Nacimiento, CA – Project Manager (2019 – 2021)**

Ms. Powers managed several projects related to the residential development, Oak Shores II, on the north shore of Lake Nacimiento. She assisted Wallace Group by interpreting historical permits regarding sensitive resource avoidance, minimization, and mitigation measures for construction and coordinating with resource agencies. Terra Verde assisted with preconstruction surveys for sensitive resources within the development footprints as well as biological monitoring support for installation of a new force main. The mitigation plan for the project included the protection of an open space oak woodland area, oak tree plantings, and construction of a recreational trail. Terra Verde biologists surveyed the proposed trail route, made suggestions for improvements to avoid resources, mapped resources, and documented the number, location, species, and size of each native tree that may be impacted by trail development. Ms. Powers coordinated closely with the client and resource agencies, prepared biologists for surveys, managed, wrote, and/or reviewed several reports, and worked with the team to problem solve.

**MNS (City of Pismo Beach) – Bello Street Bridge Rehabilitation – Pismo Beach, CA – Biologist, Compliance Monitor (2020)**

Terra Verde is providing environmental consulting services to support the replacement of the Bello Street Bridge which crosses Pismo Creek in Pismo Beach, California. Project permits required preconstruction surveys for California red-legged frog (*Rana draytonii*), southwestern pond turtle (*Actinemys pallida*), tidewater goby (*Eucyclogobius newberryi*), steelhead trout (*Oncorhynchus mykiss*), roosting bats, and nesting birds, as well as weekly compliance inspections for measures to protect these species and jurisdictional waters. In addition to inspecting the bridge and surroundings for sign of roosting bats, Ms. Powers conducted several sunset and sunrise bat emergence surveys to ensure that no bats were roosting within the old bridge before demolition. She prepared a detailed report documenting the methods and results of the bat surveys.

**Cannon – Santa Ynez Community Services District – Santa Ynez, CA – Project Manager (Summer 2020)**

Terra Verde conducted biological and botanical surveys in advance of a sewer line extension project. Ms. Powers coordinated with the client and private property owners, prepared biologists for the field, ensured safety precautions were followed, and reviewed the biological report.

**Private Developer – Pre-construction Surveys and Monitoring – San Luis Obispo County, CA – Project Manager, Biologist (2019)**

Ms. Powers conducted surveys for special-status species on several properties proposed for cannabis development in California Valley, where rare and endangered species such as San Joaquin kit foxes, giant kangaroo rats (*Dipodomys ingens*), and San Joaquin antelope squirrels (*Ammospermophilus nelsoni*) frequent. Sensitive resources were mapped and discussed with the developer. Terra Verde coordinated extensively with the client and the County of San Luis Obispo to plan best practices for protection of sensitive species during construction activities. Ms. Powers monitored removal of hazardous materials so burrows and dens were avoided and left intact.

**Aspen Environmental Group – Wildfire Risk Reduction, Reliability, and Asset Protection – Trinity County, CA – Project Manager (Spring/Summer 2020)**

Terra Verde biologists assisted Aspen with surveys of powerline corridors on U.S. Forest Service lands to inventory wildlife and plants in advance of vegetation management activities. A large field crew traversed various habitats over several weeks and identified and mapped habitat types, potential for sensitive species, and wildlife and plants observed. Ms. Powers managed the Terra Verde field team, which involved logistical considerations, equipment and schedule management, and coordination with the client.

**County of San Luis Obispo Public Works – Estrella River Bridge Replacement Project – San Luis Obispo County, CA – Project Manager, Biologist (2019 – 2020)**

Terra Verde provided environmental monitoring services for the replacement of a concrete slab bridge over the Estrella River. Ms. Powers conducted focused preconstruction surveys for San Joaquin kit foxes, American badgers (*Taxidea taxus*), and nesting birds. She also provided construction monitoring services, which included pre-activity surveys for special-status species, including California red-legged frogs. Ms. Powers prepared preconstruction reports, monitoring reports, and the completion report and coordinated with the County, project engineers, and the construction contractor.

**Private Landowner – Conservation Land Assessment – Shandon, CA – Biologist (2019)**

Terra Verde is assisting a private landowner with the process of developing a conservation bank for special-status species in the region. In addition to conducting a San Joaquin kit fox assessment of the property, Ms. Powers assisted with surveys to determine the presence

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Robyn Powers, Senior Biologist



of special-status amphibians, such as California red-legged frog, California tiger salamander, and western spadefoot. Amphibian surveys included an assessment of suitable habitat on site as well as daytime observations and identification of larvae in several ponds and the use of dipnets and seines in ponds with suitable habitat for California tiger salamander, under the supervision of federal recovery permit holders with Storrer Environmental Services, LLC.

**City of San Luis Obispo – Baseline Wildlife Surveys for Miozzi Ranch Open Space – San Luis Obispo, CA – Biologist (2019)**

Terra Verde biologists performed baseline botanical and wildlife surveys at the 266-acre Miozzi Ranch Open Space, which was recently acquired by the City of San Luis Obispo. To inventory species of mammals using the site, Ms. Powers set remote sensor cameras along wildlife trails and near water features and set a bat detector near a water source most likely to be used by bats. She analyzed camera data and bat calls recorded by the detector to develop a list of species detected. Ms. Powers prepared a report of methods and results for submission to the City.

**PROJECT EXAMPLES PRIOR TO TERRA VERDE:**

**SunPower/NRG Energy/Clearway Energy– California Valley Solar Ranch – San Luis Obispo County, CA – Project Manager, Biologist (January 2017 – February 2019); San Joaquin Kit Fox Compliance, Monitoring, and Research Lead (2012 – 2019)**

During construction of the California Valley Solar Ranch (CVSR), a 250-megawatt photovoltaic solar plant north of Carrizo Plain National Monument, Ms. Powers performed, coordinated, and supervised the monitoring of San Joaquin kit foxes and their den resources. She advised on and supervised the implementation of all avoidance and minimization measures required by federal, state, and county permits. As a designated biologist, she also surveyed for and monitored other special-status species, such as San Joaquin antelope squirrels, giant kangaroo rats, burrowing owls (*Athene cunicularia*), and American badgers. During the operational phase of CVSR, in addition to continuing special-status survey monitoring, Ms. Powers led a telemetry study to compare the reproduction, survival, and habitat selection of San Joaquin kit foxes inhabiting lands in and around the solar site with kit foxes in an area unaffected by solar development. From 2017 to 2019, Ms. Powers managed the CVSR project, overseeing permit compliance, surveys, and reporting for the site as well as mammal tasks for the Habitat Mitigation and Monitoring Plan. Ms. Powers presented related work at The Western Section of the Wildlife Society, The California Central Coast Chapter of the Wildlife Society, and the San Joaquin Valley Natural Communities Conference.

**Altamont Wind Resource Area – Avian and Bat Protection Plan Implementation – Alameda County, CA – Detection Dog Program Manager, Biologist (2016 – 2019)**

Ms. Powers managed a team of ecological scent-detection dogs and handlers to survey for fatalities in support of the avian and bat protection plan for a large-scale wind project in the Altamont Wind Resource Area. She was responsible for scheduling, staff oversight, and detection dog-handler team quality assurance. She also performed avian and bat fatality surveys as a detection dog handler.

**Contra Costa Water District – Los Vaqueros Watershed Habitat Management – Concord, CA – San Joaquin Kit Fox Surveys Manager (2017 – 2019)**

On 25,000 acres of the Los Vaqueros Reservoir watershed and associated conservation lands in Contra Costa County, California, Ms. Powers managed the monitoring efforts for San Joaquin kit foxes. She identified opportunities for efficiencies and focused monitoring in areas with the most suitable habitat and that were most likely to be used by kit foxes based on their ecology and behavior. Tasks also included field staff management and remote-sensor camera photo review for species identification.

**Caltrans – Cherry Avenue Truck Climbing Lanes – Kern County, CA – Project Manager (2016 – 2017)**

Along 3 miles of rural highway slated to be widened to accommodate an extension of truck climbing lanes, Ms. Powers managed small mammal trapping surveys targeting the endangered giant kangaroo rat and threatened San Joaquin antelope squirrel. She also managed efforts to survey the project route for sign of the special-status San Joaquin kit fox and burrowing owl, which included remote camera monitoring of potential dens or burrows in the project impact area to confirm vacancy. All surveys were performed and documented in accordance with the project's biological opinion, incidental take permit, lake or streambed alteration agreement, and multiple species relocation and mitigation plans. In addition to her project management responsibilities, Ms. Powers provided kit fox expertise to the project team.

**California Department of Fish and Wildlife – Giant Garter Snake Surveys using Detection Dogs – San Joaquin Valley, CA – Project Manager, Detection Dog Program Manager (2016)**

The visually elusive giant garter snake occurs at low densities in much of the San Joaquin Valley, which results in low detection probability and poor understanding of occupancy patterns throughout much of its range. Ms. Powers led detection dog teams as a

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*Robyn Powers, Senior Biologist*



component of a large study to examine the distribution, abundance, and demography of the species and field test new sampling techniques to facilitate species management and conservation. The detection dogs surveyed for giant garter snakes in their aquatic environment and detections were confirmed using environmental DNA. Ms. Powers worked closely with species expert Eric C. Hansen and with agency personnel to develop survey techniques and brainstorm best practices. She managed the teams' schedule and all logistics and supported the teams in the field. This spearheaded a study, that Ms. Powers managed, to refine the survey technique for more widespread use.

**Private Developer – San Joaquin Kit Fox Surveys – Tulare County, CA – Project Manager, Detection Dog Program Manager (2016)**

Ms. Powers managed a San Joaquin kit fox survey effort, which was completed with ecological scent-detection dogs, on 36,377 acres of rangeland in unincorporated Tulare County, CA. She was responsible for ensuring the readiness of the survey teams, strategizing the most efficient and effective survey approach, preparing teams for the field, ensuring team safety, and completing a detailed survey report.

**U.S. Fish and Wildlife Service – Pilot Study for the Use of Detection Dogs to Survey for California Tiger Salamanders – San Luis Obispo, CA – Detection Dog Program Manager (2015 – 2016)**

To address challenges to current protocol surveys for California tiger salamanders (*Ambystoma californiense*), the U.S. Fish and Wildlife Service funded a study to test the use of ecological scent-detection dogs for surveys of the species. Ms. Powers coordinated closely with agency personnel and species experts to inform the design of the study and identify desired outcomes. She led the team of handlers and dogs, coordinated with the lead trainer, and addressed challenges with creative troubleshooting. Her duties also included overseeing the care of captive salamanders used for the study, as well as the capture and care of nontarget amphibian species. After completion of the study, she prepared a detailed report; presented the findings to the U. S. Fish and Wildlife Service, Dr. Brad Shaffer's

**Solar Project in Southern Monterey County – Cholame, CA – Biologist (2013)**

Ms. Powers conducted San Joaquin kit fox scat surveys, using detection dogs, to establish a baseline understanding of kit fox use of the project site, adjacent land, and potential mitigation land.

**MASTER'S THESIS**

Powers, R. M. 2009. Social behavior measured by home range overlap in island foxes (*Urocyon littoralis dickeyi*). Thesis. San Francisco State University, California.

**SCIENTIFIC COMMUNITY INVOLVEMENT**

- California Central Coast Chapter of the Wildlife Society. San Joaquin Kit Fox Workshop Instructor: 2013–2015 and 2017–2018.
- Student Chapter of the Wildlife Society. Field Trip to Carrizo Plain Instructor/Guest Speaker: 2016.

**PROFESSIONAL MEMBERSHIPS**

- The Wildlife Society
- The Western Section of the Wildlife Society
- The Central Coast Chapter of the Wildlife Society
- The San Joaquin Chapter of the Wildlife Society

**PUBLICATIONS**

Powers, R. M., B. L. Cypher, K. Ralls, J. A. Randall, and E. C. Kelly. 2021. Ecological variation among island foxes relative to reproductive events. California Fish and Wildlife Journal Special CESA Issue:400-415.

Powers, R. M. 2018. Detection dogs as ambassadors and field assistants to protect imperiled reptiles and amphibians. Chapter 2 in N. Richards, editor, Using Detection Dogs to Monitor Aquatic Ecosystem Health and Protect Aquatic Resources. Palgrave Macmillan, Cham, Switzerland.

Clark, H. O., R. M. Powers, K. L. Uschyk, and R. K. Burton. 2015. Observations of antagonistic and nonantagonistic interactions between the San Joaquin kit fox (*Vulpes macrotis mutica*) and the American badger (*Taxidea taxus*). The Southwestern Naturalist 60(1):106–110.



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**SARA SNYDER, WILDLIFE BIOLOGIST**

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**EDUCATION**

M.S. Biology, California Polytechnic State University, San Luis Obispo, 2014  
B.S. Marine Biology, University of California Santa Cruz, Santa Cruz, 2005

**PROFESSIONAL CERTIFICATIONS**

- U.S. Fish and Wildlife Service Vernal Pool Fairy Shrimp T & E Recovery Permit # TE32232D-0
- California Department of Fish and Wildlife Scientific Specific Use Collecting Permit # S-182750007-19101-001
- California Department of Fish and Game Plant Voucher Collecting Permit No. 2081(a)-21-046-V

**AREAS OF EXPERTISE**

Ms. Snyder has technical expertise in the following areas:

- California red-legged frog (*Rana draytonii*; CRLF) site assessment, surveys, and monitoring
- Vernal pool habitat assessment and special-status vernal pool wildlife surveys
- Biological and botanical surveys, habitat assessment, and monitoring
- Special-status species surveys, identification, and monitoring
- Special-status and general avian surveys, identification, and monitoring
- Habitat restoration and monitoring
- Technical document preparation, including biological assessments, natural environmental studies, and monitoring reports
- GIS mapping and analysis
- Environmental and construction compliance monitoring
- Jurisdictional delineations and wetland assessment

**REPRESENTATIVE EXPERIENCE:**

Ms. Snyder has over 15 years of experience conducting biological assessment, special-status species surveys, and environmental compliance for a wide variety of projects with an emphasis on oil and gas, wind and solar energy generation and water banking. Ms. Snyder's responsibilities have included: biological resources assessments, permitting, compliance monitoring and training, and special-status species site assessments, surveys, and monitoring.

**RELEVANT CURRENT PROJECTS:**

**County of San Luis Obispo – Arroyo Grande Creek Waterway Management Project – San Luis Obispo County, CA – Project Manager, Biologist (April 2020 – Present)**

Terra Verde is providing environmental consulting services to the County of San Luis Obispo Public Works Department for the first phase of the Arroyo Grande Creek Waterway Management Program. The project site includes the lower 2.75 miles of Arroyo Grande Creek and adjacent Los Berros Creek diversion channel, which a channelized system known to support California red-legged frog (CRLF; *Rana draytonii*), steelhead (*Oncorhynchus mykiss*), and other special-status species. Ms. Snyder manages all aspects of the project, such as coordination with the County and other project consultants; scheduling and planning; adaptive management recommendations and implementation; conducting special-status species, nesting bird, and water quality surveys in support of management activities and wildlife inventory surveys to track wildlife use within restoration areas; and preparation of annual reports for project permits and other deliverables.

**Diablo Canyon Power Plant Decommissioning Project - San Luis Obispo County – Biologist, GIS Specialist (March 2020 – Present)**

Terra Verde was retained by Pacific Gas & Electric to provide environmental consulting services in support of decommissioning the Diablo Canyon Power Plant. The project site consisted of the Diablo Canyon Power Plant, the Pismo Beach Materials Handling Facility, and two railyard sites in Santa Barbara County. In support of the Decommissioning Project Ms. Snyder has completed scientific literature reviews including consulting various biological databases managed by environmental resource agencies and past technical studies completed for the facilities, conducted on site surveys to assess and map habitats, assess suitability for sensitive species, delineate waters and wetlands, complete plant and wildlife inventories, and provide recommendations to avoid and minimize damage to special-status species and habitats during project implementation. In addition, Ms. Snyder has conduct protocol-level California red-legged frog surveys, GIS mapping, and technical document preparation.

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*Sara Snyder, Wildlife Biologist*



**MNS Engineers, Inc – Bello Street Bridge Project – Pismo Beach, CA – Biologist (May 2020 – Present)**

Terra Verde is providing environmental services to support the replacement of the Bello Street Bridge in Pismo Beach, California. Ms. Snyder assisted with preconstruction surveys for nesting birds and California red-legged frogs and provided biological monitoring and inspections during construction.

**County of San Luis Obispo – Arroyo Grande Creek Waterway Management Project – San Luis Obispo County, CA – Biologist (April 2020 – Present)**

Terra Verde is providing environmental consulting services to the County of San Luis Obispo Public Works Department for the first phase of the Arroyo Grande Creek Waterway Management Program. The program includes management of up to 11 sediment management zones including restoration monitoring and invasive species management. Ms. Snyder completes pre-activity special-status species surveys in support of management activities and wildlife inventory surveys to track wildlife use within restoration areas.

**Pacific Gas & Electric – Wildfire Safety and Inspection Program – San Luis Obispo County, CA (April 2019 – Present)**

As a subcontractor, Terra Verde is providing ongoing support for the PG&E Wildfire Safety and Inspection Program (WSIP). Ms. Snyder has conducted special-status species and nesting bird surveys and monitoring for various project sites throughout Monterey, San Luis Obispo, and Santa Barbara County.

**RELEVANT PAST EXPERIENCE:**

**Justin Vineyards and Winery – Vineyard Biological Assessment – San Luis Obispo County, CA – Wildlife Biologist (November 2019 – July 2020)**

Terra Verde provided environmental services to support the expansion of Justin Vineyards in northwestern San Luis Obispo County, California at two locations. Ms. Snyder completed a habitat assessment and an assessment and mapping of hydrological resources of the sites. Ms. Snyder also led the technical document preparation and GIS analysis for the projects.

**Aspen Environmental Group – Trinity Public Utilities District – Wildfire Risk Reduction, Reliability, and Asset Protection Project – Trinity County, CA – Biologist (June 2020)**

As a subcontractor to Aspen Environmental Group, Terra Verde conducted biological surveys in support of a Wildlife Risk Reduction Project for the Trinity Public Utilities District. Ms. Snyder assisted in biological surveys throughout rural areas of Trinity County. Specifically, surveys focused on the identification of rare plants and wildlife, as well as mapping habitat communities within multiple survey zones. The surveys covered a 250-foot corridor along approximately 500 miles of electrical transmission lines. Ms. Snyder identified foothill yellow-legged frog (*Rana boylei*; California Species of Special Concern) during these surveys.

**County of San Luis Obispo Public Works – Estrella Bridge Replacement Project – Paso Robles, CA – Biologist (June 2019 – Present)**

Terra Verde is providing environmental services for the replacement of an existing concrete slab bridge over the Estrella River. Ms. Snyder is responsible for completing nesting bird and special-status species surveys, environmental crew trainings, biological monitoring, and inspections throughout construction, as well as schedule coordination with contractor foreman and engineers.

**County of San Luis Obispo Public Works – Geneseo Bridge Project – Paso Robles, CA – Biologist (July 2019 – Present)**

Terra Verde is providing environmental services for the construction of a concrete slab bridge within an existing low water crossing of the west branch of the Huer Huero Creek. Ms. Snyder is responsible for completing nesting bird surveys, biological monitoring, and inspections throughout construction, as well as schedule coordination with contractor foreman and engineers.

**City of San Luis Obispo – Miossi Ranch Biological Resources Assessment – San Luis Obispo, CA – Biologist (2019)**

Terra Verde completed a biological resources assessment for the City of San Luis Obispo at its newly-acquired open space property. To support the City in adding Miossi Ranch to the existing network of publicly accessible open space lands, Terra Verde completed an inventory and assessment of biological resources present on the property. Surveys included a botanical inventory, wildlife surveys, vegetation community classification and mapping, a habitat assessment, and an evaluation of management considerations. Ms. Snyder conducted three surveys on the approximately 335-acre property, which included a botanical inventory, mapping of noxious and special-status species populations, habitat assessment, vegetation community mapping and general wildlife surveys.

**Insignia – Southern California Gas Company Line 85 Replacement Project – Kern County, CA – Biologist (2018 – 2019)**

Terra Verde supported Insignia and Southern California Gas Company in the development of a biological resource assessment for the replacement of an approximately thirteen-mile section of pipeline. Ms. Snyder completed a habitat and special-status species assessment including assisting with botanical surveys and mapping. Sensitive species assessed included San Joaquin kit fox, Nelson's

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*Sara Snyder, Wildlife Biologist*



antelope squirrel, Le Conte's thrasher, American badger, blunt-nosed leopard lizard, Swainson's hawk, giant kangaroo rat, and short-nosed kangaroo rat.

**Morro Bay National Estuary Program – Chorro Creek Floodplain Enhancement Project – San Luis Obispo, CA – Biologist (2019)**

Terra Verde provided a habitat assessment for California red-legged frog, pre-construction nesting bid survey and construction monitoring for the Morro Bay National Estuary Program in support of the Chorro Creek Floodplain Enhancement Project. Ms. Snyder completed a California red-legged frog site assessment and a night survey according to the USFWS 2005 Guidance.

**Larkin Group – Vandenberg Dunes Golf Course – Lompoc, CA – Lead Field Biologist (2017 – 2018)**

While employed at AECOM, Ms. Snyder led site wide surveys to assess potential for occurrence and identify habitat for sensitive species. Species included: California red-legged frog, California tiger salamander, El Segundo blue butterfly (sea cliff buckwheat), spadefoot toad, San Diego woodrat, vernal pool fairy shrimp, monarch butterfly, and breeding birds. Ms. Snyder verified vegetation mapping for the project site provided by Vandenberg AFB and assisted with wetland delineations for the entire project site following the U.S. Army Corp of Engineers (USACE) Wetland Delineation Manual and Arid West Supplement.

**Windset Farms – California red-legged frog Habitat Assessment – Santa Maria, CA – Wildlife Biologist (2017 – 2018)**

While employed at AECOM, Ms. Snyder conducted a California red-legged frog Habitat Assessment for the proposed greenhouse expansion of Windset Farms facility in Santa Maria, CA. Ms. Snyder also assisted with protocol level surveys of the water features on the property.

**United Launch Alliance – Harbor Dredging – Lompoc, CA – Marine Mammal Monitor (2016 – 2017)**

While employed at AECOM, Ms. Snyder provided marine mammal monitoring of harbor seals, California sea lions and sea otters during harbor dredging and barge loading and unloading activities on Vandenberg Air Force Base.

**Freeport-McMoRan Oil and Gas – Pt. Pedernales Pipeline Changeover – Lompoc, CA – Wildlife Biologist (2016 – 2017)**

While employed at AECOM, Ms. Snyder conducted protocol surveys for California red-legged frogs in support of permitting for the Pt. Pedernales Pipeline Changeover project through Vandenberg Air Force Base. Ms. Snyder also assisted with the compliance monitoring during the construction phase of the project.

**SPECIALIZED TRAINING**

- Riparian Bird Workshop, The Wildlife Society, Central Coast Chapter, June 2018, and June 2019 (participated and helped host; heard 6 least Bell's vireos and 7 willow flycatchers)
- Declining Aquatic and Semi-Aquatic Herps of the Central Coast, The Wildlife Society, Central Coast Chapter, April 2016, 2017, 2018, and 2019 (participated and helped host)
- Vernal Pool Branchiopods: A Workshop for Future Permit Holders, The Wildlife Society, Western Section, February 2018
- Wetland Delineation Workshop, Jepson Herbarium, May 2017
- San Luis Obispo County Qualified Biologist Workshop, October 2015 and 2016
- Marine Mammal Workshop, The Wildlife Society, San Francisco Bay Area Chapter, September 2016
- Blunt-nosed Leopard Lizard Workshop, The Wildlife Society, San Joaquin Chapter, May 2016
- Rare Pond Species Survey Methods Workshop - CRLF, CTS and western pond turtle handling and identification, The Wildlife Project, March 2016
- Terrestrial Ecology of California Tiger Salamander Workshop, The Wildlife Project, March 2016
- Western Pond Turtle Workshop: Ecology and Conservation, The Wildlife Society, San Francisco Bay Area Chapter, October 24, 2015
- San Joaquin Kit Fox Workshop, The Wildlife Society, Central Coast Chapter, October 2015 (attendee) and 2018 (helped host)
- Burrowing Owl Workshop, Elkhorn Slough Coastal Training Program, August 2015

**PROFESSIONAL AFFILIATIONS**

- The Wildlife Society: Council, Western Section, California Central Coast Chapter, San Joaquin Chapter, San Francisco Bay Chapter; currently Central Coast Chapter President

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*Sara Snyder, Wildlife Biologist*



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**PATRICK SCOTT, WILDLIFE BIOLOGIST**

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**EDUCATION**

M.S. Environmental Science – Southern Cross University, Lismore, NSW, Australia, 2010

B.S. Biology – Mount Allison University, Sackville, NB, Canada, 2006

**RELEVANT PROFESSIONAL CERTIFICATIONS, PERMITS, AND APPROVALS**

- California Department of Fish and Wildlife Scientific Collecting Permit (#SC-12515)
- U. S. Fish and Wildlife Service (USFWS) Authorized California red-legged frog (*Rana draytonii*; CRLF) Biologist (survey, monitor, and capture and handle) under the Caltrans' Programmatic Biological Opinion (8-8-10-F-58)
- USFWS Authorized CRLF and California tiger salamander (*Ambystoma californiense*; CTS) Biologist (monitor) for Caltrans' La Gloria Road Project
- USFWS – Authorized CRLF Biologist for the Arroyo Grande Creek Waterway Management Program.

**AREAS OF EXPERTISE**

Mr. Scott has technical and project management experience in the following areas:

- Special-status species habitat assessments, surveys, identification, and monitoring
- Special-status and general avian habitat assessments, surveys, identification, and nest monitoring
- GIS (ArcMap 10.0 and newer) and GPS applications for pre-project planning, data collection and analysis, and producing project deliverables
- Environmental compliance monitoring for small- to large-scale construction projects
- Technical document preparation, natural environmental studies, and biological resource assessments

**RELEVANT CURRENT EXPERIENCE:**

**Atlas Technical Consultants – Conoco Phillips Telephone Soil Road Remediation Project – Santa Maria, CA – Wildlife Biologist (2022 – Present)**

Terra Verde is providing environmental consulting services to the Atlas Technical Consultants for the Conoco Phillips Telephone Road Soil Remediation Project in Santa Maria, CA. Mr. Scott prepared the technical document for the project and is assisting with agency consultation for potential impacts to federally listed species.

**City of Atascadero – San Rafael Lift Station No.2 – Atascadero, CA – Wildlife Biologist (2021 – Present)**

Terra Verde is providing environmental consulting services to the City of Atascadero for the San Rafael Lift Station No.2 Project. Mr. Scott conducted the preconstruction wildlife surveys and currently assists with agency permit compliance and reporting, technical document preparation, and environmental trainings for project staff.

**City of San Luis Obispo – Sediment Removal Project – San Luis Obispo, CA – Wildlife Biologist (2021 – Present)**

Terra Verde has supported the City of San Luis Obispo with obtaining necessary regulatory agency permits for sediment removal projects in the past and has been awarded the 2021 contract to support permit acquisition for five sediment removal sites located within San Luis Obispo, California. In support of permitting efforts, Mr. Scott supports jurisdictional mapping at each proposed sediment removal location and assists in obtaining all regulatory resource agency permits as needed for maintenance work not covered under routine maintenance agreements.

**Pacific Gas & Electric – Vegetation Management Program – Kern, San Luis Obispo, and Santa Barbara Counties, CA – Wildlife Biologist (2021 – Present)**

As a subcontractor, Terra Verde is providing ongoing environmental services in support of vegetation management activities for PG&E. Mr. Scott is conducting special-status species surveys, including nesting birds, presenting environmental awareness trainings, and monitoring for various projects throughout central California.

**County of San Luis Obispo Public Works – Arroyo Grande Creek Waterway Management Program – Oceano, CA – Wildlife Biologist (2020 – Present)**

Terra Verde is providing environmental consulting services to the County of San Luis Obispo Public Works Department for the first phase of the Arroyo Grande Creek Waterway Management Program. The program includes management of up to 11 sediment management zones including restoration monitoring and invasive species management. Mr. Scott completes pre-activity special-

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*Patrick Scott, Wildlife Biologist*



status species and nesting bird surveys in support of management activities and wildlife inventory surveys to track wildlife use within restoration areas.

**MNS Engineers, Inc – Bello Street Bridge Project – Pismo Beach, CA – Wildlife Biologist (2020 – Present)**

Terra Verde is providing environmental services to support the replacement of the Bello Street bridge in Pismo Beach, California. Mr. Scott is assisting with preconstruction crepuscular surveys for bats, seine netting for special-status fish species, and construction monitoring. He is also supporting permit acquisition and technical document preparation for this project.

**Pacific Gas & Electric Company (PG&E) – Distribution Environmental Services (October 2019 – Present)**

Terra Verde has been involved as a prime contract holder and as a subcontractor to other PG&E primes with over 200 PG&E electric distribution projects. Mr. Scott has provided support in desktop and field biological assessment efforts for special-status plants and wildlife.

**PG&E – Diablo Canyon Power Plant– San Luis Obispo County, CA – Biologist (October 2019 – Present)**

Terra Verde provides biological services in support of Diablo Canyon Power Plant operations. Due to the confidentiality of this work specific tasks are not discussed.

**California Department of Transportation (Caltrans) – Mill Creek Viaduct Project – Monterey County (Big Sur), CA – Biologist (Planner/Natural Sciences) (2019)**

Mr. Scott served as the project biologist for the completion of a comprehensive Natural Environmental Study for Caltrans' Mill Creek Viaduct project. The project included removing the current road surface, constructing a land-based bridge (viaduct), updating metal beam guard rail, and restriping. The scope of work included completion of multiple focused wildlife and botanical resource surveys, in addition to a SBB habitat assessment and protocol-level surveys (species presence confirmed). The combined studies and technical report included a series of recommended avoidance and minimization measures for protection of identified sensitive biological resources.

**AGENCY PERMITS, APPROVALS, AND AUTHORIZATIONS**

- CDFW – Scientific Collecting Permit #SC-12515.
- USFWS – Authorized Biologist (CRLF – survey, monitor, and capture and handle) for Caltrans projects funded or approved under the Federal Highway Administration's (FHWA) federal aid program.
  - Bello Street Bridge Replacement Project
  - Trout Creek Bridge Replacement Project
- USFWS – Authorized Biologist (CRLF and CTS - monitor) for Caltrans' La Gloria Road Curve Correction project.
- USFWS – Authorized Biologist (CRLF) for the Arroyo Grande Creek Waterway Management Program.

**SPECIALIZED TRAINING**

- The Wildlife Society: Riparian Bird Workshop (least Bell's vireo [*Vireo bellii pusillus*], southwestern willow flycatcher [*Empidonax traillii extimus*], etc.) – Ventura/Ojai, CA – June 2019
- Caltrans: Smith's Blue Butterfly Training (Led by Authorized Biologists listed under the Caltrans PBO (1-8-07-F-68) – San Luis Obispo, CA – May 2019
- The Wildlife Society: Declining Aquatic and Semi-aquatic Herpetofauna of the Central Coast (CTS, CRLF, WPT, slender salamanders [*Batrachoseps* sp.], etc.) – San Luis Obispo, CA – April 2018
- The Wildlife Society: Mammal Track and Sign Workshop (Bobcat [*Lynx rufus*], Grey Fox [*Urocyon cinereoargenteus*], Red Fox [*Vulpes vulpes*], Coyote [*Canis latrans*], etc.) – Guadalupe, CA – April 2017
- National Audubon Society (Orange County Chapter): Birding Skills Workshop – Huntington Beach, CA – December 2011

**PROFESSIONAL AFFILIATIONS**

- The Wildlife Society (Central California Coast and San Joaquin Valley Chapters) – Present





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**AMY GOLUB, BOTANIST**

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**EDUCATION**

B.S. Environmental Studies, emphasis in Natural Resource Management and Conservation – San Francisco State University, San Francisco, 2009

B.A. Geography, San Francisco State University, 2009

**PROFESSIONAL CERTIFICATIONS**

- California Department of Fish and Game Plant Voucher Collecting Permit No. 2081(a)-18-050-V
- Mine Safety and Health Administration; 8-hour refresher, 2017
- California Division Occupational Safety and Health Administration, 40-Hour Hazardous Waste Operations and Emergency Response Safety Training; 8-hour refresher, 2017

**AREAS OF EXPERTISE**

Ms. Golub has technical expertise in the following areas:

- Botanical surveys and floristic analyses (rare plant surveys, invasive plant surveys, oak tree surveys, and vegetation mapping and classification)
- Use of botanical taxonomic dichotomous keys
- Jurisdictional determinations and wetland assessments
- Habitat restoration and monitoring
- Rare and native seed collection and plant salvage techniques
- Technical document preparation, including biological assessments, natural environmental studies, habitat mitigation and Monitoring plans, and monitoring reports
- Regulatory agency permitting
- Environmental and construction compliance monitoring

**RELEVANT CURRENT PROJECTS:**

**Creek Lands Conservation – Lower San Luis Obispo Fish Passage Project – Avila Beach, San Luis Obispo County, California – Botanist, Permitting Coordinator (May 2020 – Present)**

Terra Verde provided environmental support for a creek passage improvement project located in the lower reaches of San Luis Obispo Creek, Avila Beach, San Luis Obispo County, California. The project includes repair and improvement to an existing weir to improve fish passage. Ms. Golub supported conducting a jurisdictional delineation and formal wetland delineation of the federal and state waters and wetlands as well as prepared a Habitat Restoration and Monitoring Plan in support the permitting process. Ms. Golub led the initial permitting effort, which included obtaining a Small Habitat Restoration Project Notice of Applicability and submitting a U.S. Army Corps of Engineers Nationwide Permit 27 application and appropriate documents to support Section 7 consultation with the U.S. Fish and Wildlife Service and the National Marine Fisheries Service. Terra Verde is expected to provide continued permitting support on the project including preparing and submitting a Habitat Restoration or Enhancement Project Request Form to the California Department of Fish and Wildlife.

**City of Paso Robles – Propeller Drive Extension Project– Paso Robles, CA – Botanist, Permitting Coordinator (January 2020 – Present)**

Terra Verde is supporting the City of Paso Robles with environmental permitting for the Propeller Drive Extension Project. In support of this project, Terra Verde completed a biological resources assessment, including botanical surveys, habitat assessment, and jurisdictional determination for waters and wetlands. Ms. Golub is responsible for obtaining all regulatory agency permits to complete the project including a U.S. Army Corps of Engineers Section 404 Nationwide Permit, a Regional Water Quality Control Board Section 401 Water Quality Certification, and a California Department of Fish and Wildlife Streambed Alteration Agreement. Ms. Golub also developed a Compensatory Mitigation Plan for unavoidable impacts to jurisdictional waters in support of the permitting process for resources agency review and approval. Ms. Golub is currently in the permitting review stage with resources agencies.

**City of Paso Robles – Dry Creek Road Realignment Project– Paso Robles, CA – Botanist, Permitting Coordinator (January 2019 – Present)**

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*Amy Golub, Botanist*



Terra Verde is supporting the City of Paso Robles with environmental permitting for the Dry Creek Road Realignment Project. In support of this project, Terra Verde completed a multi-season field assessment, including botanical surveys, habitat assessment, and jurisdictional determination for waters and wetlands, including vernal pools. Ms. Golub is coordinating agency consultation with the Regional Water Quality Control Board, California Department of Fish and Wildlife, and U.S. Army Corps of Engineers, including Section 7 consultation for potential impacts to vernal pool fairy shrimp (*Branchinecta lynchi*) critical habitat. Ms. Golub also developed a Compensatory Mitigation and Monitoring Plan for impacts to vernal pool fairy shrimp critical habitat.

**City of San Luis Obispo – Urban Streams Routine Maintenance Project – San Luis Obispo, CA – Permitting Coordinator (October 2017 – Present)**

The City of San Luis Obispo is responsible for conducting routine maintenance within San Luis Obispo Creek and its tributaries in accordance with the San Luis Obispo Creek Waterway Management Plan. The City of San Luis Obispo obtained a new standard agreement to conduct routine maintenance, which includes up to 14 different sediment removal sites through City Limits. Ms. Golub is currently supporting obtaining an amendment to the existing routine maintenance agreement to include grazing as a method for vegetation management at select project sites.

**City of San Luis Obispo – Sediment Removal Project – San Luis Obispo, CA – Permitting Coordinator (October 2017 – Present)**

Terra Verde has supported the City of San Luis Obispo with obtaining necessary regulatory agency permits for sediment removal projects in the past and has been awarded the 2021 contract to support permit acquisition for five sediment removal sites located within San Luis Obispo, California. In support of permitting efforts, Ms. Golub supports jurisdictional determinations at each proposed sediment removal location and is responsible for obtaining all regulatory resource agency permits as needed for maintenance work not covered under routine maintenance agreements.

**Santa Margarita Ranch, LLC – Tract 2586 Phase 1 Improvement Project – Santa Margarita, California – Botanist, Permitting Coordinator (September 2017 – Present)**

Terra Verde was awarded the contract to support Santa Margarita Ranch, LLC with environmental and permitting support for Phase 1 of the Tract 2586 Improvement Project located on the Santa Margarita Ranch, San Luis Obispo County, California. Terra Verde has been tasked to support acquisition of all agency permits which at this time are assumed to be a U.S. Army Corps of Engineers Section 404 Nationwide Permit, Regional Water Quality Control Board Section 401 Water Quality Certification, and a California Department of Fish and Wildlife Streambed Alteration Agreement for multiple riparian crossings. In addition, Terra Verde is responsible for development of agency required plans including a La Panza mariposa lily (*Calochortus simulans*) Mitigation and Monitoring Plan; a Riparian and Wetland Habitat Mitigation and Monitoring Plan; a Steelhead Management Plan; an Oak Tree Inventory, Avoidance, and Protection Plan; and an Oak Tree Replacement Plan. Ms. Golub is responsible for obtaining all agency permits in support of the project and preparing a habitat mitigation and monitoring plan for unavoidable impacts to waters and wetlands.

**Pacific Gas and Electric Company (PG&E) – Pecho Creek Berm Removal and Restoration Project – San Luis Obispo County, CA – Botanist, Permitting Coordinator (November 2015 – Present)**

A 40-year-old earthen berm was removed by PG&E from the bed and banks of a blue line drainage located on the Diablo Canyon Power Plant property, San Luis Obispo County, California. Ms. Golub provided biological and technical assistance including conducting a biological resources assessment, jurisdictional determination, rare plant survey, and technical document preparation. Ms. Golub was responsible for obtaining all regulatory permits including a U.S. Army Corps of Engineers Section 404 Nationwide Permit, Regional Water Quality Control Board Section 401 Water Quality Certification, and a California Department of Fish and Wildlife Streambed Alteration Agreement. As a part of permitting support, Ms. Golub worked closely with agency representatives to develop and implement an agency approved site stabilization and restoration plan for the project. Ms. Golub is currently providing annual mitigation monitoring and reporting support of restoration areas.

**City of San Luis Obispo – Calle Joaquin Lift Station Replacement Project – San Luis Obispo, CA – Botanist, Permitting Coordinator (August 2015 – Present)**

Terra Verde is providing permitting assistance to the City of San Luis Obispo for a lift station project. This project includes a complicated replacement of an existing lift station and sanitary sewer pipeline under San Luis Obispo Creek. The project has an aggressive permitting timeline and Ms. Golub has been integral in providing environmental support services during the permitting and consultation phase. Ms. Golub's communications with agencies including the United States Army Corps of Engineers, U.S. Fish Wildlife Service, National Marine Fisheries Service, and the Regional Water Quality Control Board is ongoing. Ms. Golub has led the

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Amy Golub, Botanist



permitting effort including preparing permit applications and a Site Restoration and Enhancement Plan for unavoidable impacts to riparian and wetland habitat.

#### **RELEVANT PAST PROJECTS:**

##### **Old Creek, LLC – Old Creek Pond Dredging Project – San Luis Obispo County, CA – Botanist, Permitting Coordinator (June 2015 – December 2019)**

Terra Verde provided biological and permitting support for the Old Creek Pond Dredging Project located in San Luis Obispo County, California. The project included dredging accumulated silts and sediments to increase carrying capacity of the residential reservoir. Terra Verde conducted a biological resources assessment, jurisdictional determination, and prepared and obtained applicable resource agency permits or authorizations to proceed from the U.S. Army Corps of Engineers and the California Department of Fish and Wildlife. In addition, Ms. Golub prepared and supported implementation of a Riparian Habitat Enhancement Plan. Ms. Golub is currently providing annual monitoring and reporting support for the restoration areas.

##### **Jackson Family Wines – Byron Winery Drainage Maintenance Project – Sisquoc, CA – Botanist, Resource Specialist (June 2017 – March 2018)**

Terra Vere provided biological and permitting support for the Byron Winery Drainage Maintenance Project located in Sisquoc, California. Ms. Golub was responsible for obtaining all necessary permits or authorizations to proceed from the U.S. Army Corps of Engineers, Regional Water Quality Control Board, and the California Department of Fish and Wildlife. Ms. Golub supported implementing avoidance and minimization measures for the project including environmental training and pre-activity surveys for special-status species including the federally threatened California red-legged frog (*Rana draytonii*). Ms. Golub successfully obtained all necessary permits or authorizations to proceed and the project was completed on schedule.

##### **Private Property Owner – Baddley Restoration Project – Santa Margarita, CA – Botanist (October 2015 – December 2016)**

Ms. Golub assisted in developing and implementing the site-specific Habitat Revegetation and Bank Stabilization Plan for approval by the California Department of Fish and Wildlife in support of required mitigation for unpermitted activities within the Salinas River. Ms. Golub supported a site assessment and preparation of a restoration plan which focused on identifying feasible locations for restoration, site stabilization techniques, and development of an appropriate plant palette for restoration objectives. Following agency approval, Ms. Golub implemented the restoration plan which included installation of several baffle systems and native plant cuttings in directional rows to slow water velocities during high flow events and create a stable riparian scrub community.

##### **Chevron Corporation – San Luis Obispo Tank Farm Remediation, Restoration, and Development Project – San Luis Obispo, CA – Botanist, Resources Specialist (March 2013 – June 2015)**

While employed at Padre Associates, Inc., Ms. Golub assisted in the development of the Site Restoration Plan including developing project targets and goals, rare plant monitoring, mitigation planning, and restoration implementation for the 332-acre San Luis Obispo Tank Farm Remediation, Restoration, and Development Project, which includes restoration of waters and wetlands following remediation activities. In addition, Ms. Golub assisted in site preparation for Phase I project implementation including, but not limited to, conducting rare plant surveys, native seed collection, invasive plant mapping and removal oversight, rare plant salvage and donation, and seed increase efforts. Ms. Golub provided oversight of botanical field activities, specifically native and rare plant seed collection, in support of Phase I project implementation.

##### **Chevron Corporation – Guadalupe Dunes Restoration Project – Guadalupe Dunes, CA – Botanist (April 2013 – December 2014)**

While employed at Padre Associates, Inc., Ms. Golub worked with a team of botanists and conducted annual botanical surveys of open water, transitional wetland, and foredune/coastal dune scrub habitat. In addition, Ms. Golub was approved by the San Luis Obispo County Independent Botanical Monitor in identification of sensitive species known to occur on the project site including La Graciosa thistle (*Cirsium scariosum* var. *loncholepis*), beach spectacle pod (*Dithyrea maritima*), and surf thistle (*Cirsium rhotophilum*). Ms. Golub participated in habitat enhancement projects including restoration planting and nursery operations.

#### **SPECIALIZED TRAINING**

- California Environmental Quality Act Impact Assessment Workshop; California Native Plant Society, 2015
- Definitions and Methods for Identifying and Delineating California Wetlands; Jepson Herbarium, 2015
- Streamlined Monitoring: Methods with a focus on citizen science; California Native Plant Society, 2015
- Grass Identification; California Native Plant Society San Luis Obispo Chapter, 2014

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Amy Golub, Botanist

## **6.C. Business Action Item**



## **BUSINESS ACTION ITEM STAFF REPORT**

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### **ITEM 6.C. DISCUSSION, CONSIDERATION, DIRECTION TO STAFF REGARDING THE DISTRICTS EXISTING LIABILITY INSURANCE POLICY WITH SPECIAL DISTRICT RISK MANAGEMENT AUTHORITY (SDRMA) RENEWAL.**

#### Summary:

This item was placed on the June 2021 Board meeting agenda at the request of the Chairperson. The Board was asked to review the existing insurance policy for the District to develop questions and or suggested updates to the policy. No questions or edits were provided by the Board. This item is currently being put in front of the Board at the request of Chairperson Kellas.

The Chairperson is asking that the Board consider obtaining quotes from other carriers through the use of a brokerage and or consulting firm.

The existing insurance policy expires on or about July 15, 2022, the annual renewal payment is due on or before that time.

Staff requests direction from the Board regarding this matter.

## **6.D. Business Action Item**



## BUSINESS ACTION ITEM STAFF REPORT

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### ITEM 6.D. DISCUSSION, CONSIDERATION, AND APPROVAL OF THE RECOVERED ORGANIC WASTE PRODUCT PROCUREMENT POLICY.

TO: Board of Directors  
FROM: General Manager  
DATE: June 14, 2022

SUBJECT: Recovered Organic Waste Product Procurement Policy

#### Discussion

As of January 1, 2022, SB 1383 requires jurisdictions, including special districts that provide solid waste collection services, to purchase recycled-content paper products that are recyclable. SB 1383 builds upon existing laws that require jurisdictions to purchase products that contain minimum recycled content and adds additional requirements on product recyclability and recordkeeping.

To meet the requirements of SB 1383, jurisdictions must ensure that they are purchasing paper products and printing and writing papers that meet the following SB 1383 requirements: (1) minimum recycled content and recyclability (30%); and (2) written certification from product vendors certifying that the products meet the recycled content and recyclability requirements. Jurisdictions are required to maintain records to show that they have met these procurement requirements.

The draft policy provides three options for the Board's consideration:

**Option 1** - would require the District to purchase recycled content paper products when fitness and quality are equal to non-recycled items and the recycled product is available at the same or lesser cost.

**Option 2** - would require the District to purchase recycled content paper products when fitness and quality are equal to non-recycled items, and the recycled product is available at the same or lesser cost or whenever the cost of recycled product is no more than a certain percentage higher than non-recyclable products. The District would need to select the desired percentage for this option. CalRecycle guidelines suggest somewhere between 5 to 10 percent.

**Option 3** - would require the District to purchase recycled content paper products when fitness and quality are equal to non-recycled items regardless of the cost difference. Recycled paper products would be purchased in all cases unless the product quality is deficient.

Recommendation:

It is recommended that the Board of Directors review and discuss the draft policy, select one of the three options in Section 3.1.A, and approve the policy.

Results:

Adoption of a Recovered Organic Waste Product Procurement Policy will meet the requirements of SB 1383.

Attachment A: Recovered Organic Waste Product Procurement Policy



# RECOVERED ORGANIC WASTE PRODUCT PROCUREMENT POLICY

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## Section 1. Purpose

It is the policy of the District, applicable to all departments, to incorporate environmental considerations including recycled-content and recovered Organic Waste product use into purchasing practices and procurement. This Recovered Organic Waste Product Procurement Policy (Policy) will help the District to:

- A. Protect and conserve natural resources, water, and energy;
- B. Minimize the District’s contribution to climate change, pollution, and solid waste disposal; and
- C. Comply with State requirements as contained in 14 CCR Division 7, Chapter 12, Article 12 (SB 1383 procurement regulations) to procure a specified amount of Recovered Organic Waste Products to support Organic Waste disposal reduction targets and markets for products made from recycled and recovered Organic Waste materials, and to purchase Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper.

## Section 2. Definitions

- A. “Direct Service Provider” means a person, company, agency, district, or other entity that provides a service or services to the District pursuant to a contract or other written agreement or as otherwise defined in 14 CCR Section 18982(a)(17).
- B. “District” means the San Simeon Community Services District.
- C. “Organic Waste” means solid wastes containing material originated from living organisms and their metabolic waste products including, but not limited to, food, yard trimmings, organic textiles and carpets, lumber, wood, Paper Products, Printing And Writing Paper, manure, biosolids, digestate, and sludges, or as otherwise defined in 14 CCR Section 18982(a)(46). Biosolids and digestate are

as defined in 14 CCR Section 18982(a)(4) and 14 CCR Section 18982(a)(16.5), respectively.

- D. "Paper Products" include, but are not limited to, paper janitorial supplies, cartons, wrapping, packaging, file folders, hanging files, corrugated boxes, tissue, and toweling; or as otherwise defined in 14 CCR Section 18982(a)(51).
- E. "Printing and Writing Papers" include, but are not limited to, copy, xerographic, watermark, cotton fiber, offset, forms, computer printout paper, white wove envelopes, manila envelopes, book paper, note pads, writing tablets, newsprint, and other uncoated writing papers, posters, index cards, calendars, brochures, reports, magazines, and publications; or as otherwise defined in 14 CCR Section 18982(a)(54).
- F. "Recyclability" means that the Paper Products and Printing and Writing Paper offered or sold to the District are eligible to be labeled with an unqualified recyclable label as defined in 16 Code of Federal Regulations Section 260.12 (2013).
- G. "Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper" means such products that consist of at least thirty percent (30%), by fiber weight, postconsumer fiber, consistent with the requirements of Sections 22150 to 22154 and Sections 12200 and 12209 of the Public Contract Code, and as amended.
- H. "SB 1383" means Senate Bill 1383 of 2016 approved by the Governor on September 19, 2016, which added Sections 39730.5, 39730.6, 39730.7, and 39730.8 to the Health and Safety Code, and added Chapter 13.1 (commencing with Section 42652) to Part 3 of Division 30 of the Public Resources Code, establishing methane emissions reduction targets in a statewide effort to reduce emissions of short-lived climate pollutants, as amended, supplemented, superseded, and replaced from time to time.
- I. "State" means the State of California.

### **Section 3. Recycled-Content Paper Procurement**

#### **3.1 Requirements for the District**

- A. **Option 1: Comparable or more favorable pricing:** If fitness and quality of Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper are equal to that of non-recycled items, the District shall purchase Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper that consists of at least thirty percent (30%), by fiber weight, postconsumer fiber, whenever available at the same or a lesser total cost than non-recycled items, consistent with the requirements of the Public Contracts Code, Sections 22150 through 22154 and Sections 12200 and 12209, as amended.

**Option 2: Price preference:** If fitness and quality of Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper are equal to that of non-recycled items, all departments and divisions of Jurisdiction shall purchase Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper that consists of at least thirty percent (30%), by fiber weight, postconsumer fiber, whenever the total cost is the same or a lesser total cost than non-recycled items or whenever the total cost is no more than \_\_\_\_\_ percent (\_\_\_\_%) of the total cost for the non-recycled items, consistent with the requirements of the Public Contract Code, Sections 22150 through 22154 and Sections 12200 and 12209, as amended.

**Option 3: No price preference:** If fitness and quality of Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper are equal to that of non-recycled items, the District shall purchase Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper (rather than non-recycled items) that consists of at least thirty percent (30%), by fiber weight, postconsumer fiber, consistent with the requirements of the Public Contract Code, Sections 22150 through 22154 and Sections 12200 and 12209, as amended.

- B. All Paper Products and Printing and Writing Paper shall be eligible to be labeled with an unqualified recyclable label as defined in Title 16 Code of Federal Regulations Section 260.12 (2013).
- C. To keep a record of all Paper Products and Printing and Writing Paper purchases on a scheduled determined by the District but not less than annually (both recycled-content and non-recycled content, if any is purchased) made by the District. Records shall include a copy of the invoice or other documentation of purchase, written certifications for recycled-content purchases, vendor name, purchaser name, quantity purchased, date purchased, and recycled content (including products that contain none), and if non-Recycled-Content Paper Products and/or non-Recycled-Content Printing and Writing Paper are provided, include a description of why Recycled-Content Paper Products and/or Recycled-Content Printing and Writing Paper were not provided.

### **3.2 Requirements for Vendors**

- A. All vendors that provide Paper Products (including janitorial Paper Products) and Printing and Writing Paper to District shall:
  - 1. Provide Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper that consists of at least thirty percent (30%), by fiber weight, postconsumer fiber, if fitness and quality are equal to that of non-recycled item.
  - 2. Only provide Paper Products and Printing and Writing Papers that meet Federal Trade Commission Recyclability standard as defined in Title 16 Code of Federal Regulations Section 260.12 (2013).

3. Certify in writing, under penalty of perjury, the minimum percentage of postconsumer material in the Paper Products and Printing and Writing Paper offered or sold to the District. This certification requirement may be waived if the percentage of postconsumer material in the Paper Products, Printing and Writing Paper, or both can be verified by a product label, catalog, invoice, or a manufacturer or vendor internet website.
  4. Certify in writing, under penalty of perjury, that the Paper Products and Printing and Writing Paper offered or sold to the District is eligible to be labeled with an unqualified recyclable label as defined in Title 16 Code of Federal Regulations Section 260.12 (2013).
  5. Provide records to the District of all Paper Products and Printing and Writing Paper purchased from the vendor within thirty (30) days of the purchase (both recycled-content and non-recycled content, if any is purchased) made by a division or department or employee of the District. Records shall include a copy of the invoice or other documentation of purchase, written certifications as required in Section 3 for recycled-content purchases, purchaser name, quantity purchased, date purchased, and recycled content (including products that contain none), and if non-Recycled-Content Paper Products and/or non- Recycled-Content Printing and Writing Paper are provided, include a description of why Recycled-Content Paper Products and/or Recycled-Content Printing and Writing Paper were not provided.
- B. All vendors providing printing services to the District via a printing contract or written agreement, shall use Printing and Writing Paper that consists of at least thirty percent (30%), by fiber weight, postconsumer fiber, or as amended by Public Contract Code Section 12209.

#### **Section 4. Recordkeeping Responsibilities**

- A. The District General Manager or his/her designee will be responsible for obtaining records pertaining to Procurement of Recovered Organic Waste Products and Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper.
- B. The District will track Procurement of Recovered Organic Waste Products, Recycled-Content Paper Products, and Recycled-Content Printing and Writing Paper as follows:
  1. Collect and collate copies of invoices or receipts (paper or electronic) or other proof of purchase that describe the procurement of Printing and Writing Paper and Paper Products, including the volume and type of all paper purchases; and, copies of certifications and other required verifications from all departments and/or divisions procuring Paper Products and Printing and Writing Paper (whether or not they contain

recycled content) and/or from the vendors providing Printing and Writing Paper and Paper Products. These records must be kept as part of District's documentation of its compliance with 14 CCR Section 18993.3.

2. Collect and collate copies of invoices or receipts or documentation evidencing procurement from all departments and divisions procuring Recovered Organic Waste Products and invoices or similar records from vendors/contractors/others procuring Recovered Organic Waste Products on behalf of the District to develop evidence of District meeting its Annual Recovered Organic Waste Product Procurement Target. These records must be kept as part of the District's documentation of its compliance with 14 CCR Section 18993.1.
3. Collect, collate, and maintain documentation submitted by the District, Direct Service Providers, and/or vendors in accordance with this Policy.
4. Compile an annual report on the District's direct procurement, and vendor/other procurement on behalf of the District, of Recovered Organic Waste Products, Recycled-Content Paper Products, and Recycled-Content Printing and Writing Paper, consistent with the recordkeeping requirements contained in 14 CCR Section 18993.2 for the Annual Recovered Organic Waste Product Procurement Target and 14 CCR Section 18993.4 for Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper procurement. This report shall be made available to the District's responsible entity for compiling the annual report to be submitted to CalRecycle (which will include a description of compliance on many other SB 1383 regulatory requirements) pursuant to 14 CCR Division 7, Chapter 12, Article 13.

### **Section 5. Effective Date of Policy**

This Policy shall go into effect \_\_\_\_\_, 2022.

## **6.E. Business Action Item**



## **BUSINESS ACTION ITEM STAFF REPORT**

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### **ITEM 6.E. DIRECTION REGARDING A REQUEST FOR PROPOSAL RELATED TO SERVICES FOR OPERATIONS, MAINTENANCE, AND GENERAL MANAGER SERVICES.**

#### Summary:

In 2014, the San Simeon CSD entered into a professional services agreement with the current contractor Grace Environmental Services (GES), to provide operations and management services to the community of San Simeon. The current contract was renewed in 2016 and is set to expire in January 2023. This item was previously discussed during the May 26, 2022 Special meeting.

#### Recommended:

It is suggested that Oliveira Environmental Consulting (OEC) draft a request for proposal (RFP) for operations, maintenance, and general manager services. A draft version of any RFP should be brought back to the Board for final approval prior to its issuance. Additionally, to avoid any potential concerns related to conflict of interest, the RFP process should be handled directly by Adamski, Moroski, Madden, and Green, LLC.