

**December 11, 2013 SanBAG Staff Report  
on the Development of a  
Countywide Habitat Preservation/  
Conservation Framework**

**Attachment 1**



- San Bernardino County Transportation Commission ■ San Bernardino County Transportation Authority
- San Bernardino County Congestion Management Agency ■ Service Authority for Freeway Emergencies

*Minute Action*

AGENDA ITEM:   11  

**Date:** December 11, 2013

**Subject:** Development of a Countywide Habitat Preservation/Conservation Framework

**Recommendation:**\* That the Committee recommend the Board, acting as the San Bernardino County Council of Governments:

1. Approve the attached scope of work for Development of a Countywide Habitat Preservation/Conservation Framework.
2. Authorize the release of Request for Proposals No. 14113 for consultant support to complete the study of a Countywide Habitat Preservation/Conservation Framework consistent with the approved scope of work.

**Background:** The proposed development of a Countywide Habitat Preservation/Conservation Framework is an outgrowth of the San Bernardino Countywide Vision, initiated in 2010, driven by community input, and endorsed by the County of San Bernardino and the 24 cities in the County. This Request for Proposal (RFP) seeks assistance to build on these efforts by structuring a more comprehensive countywide framework for habitat preservation/conservation going forward. The objective is to structure this comprehensive approach in a way that is a “win-win” for the environment, the economy, and the citizens of San Bernardino County.

This project will support one of the initiatives of the Environment Element Group of the Countywide Vision by structuring a more comprehensive approach to

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*Approved*  
*General Policy Committee*

*Date:* \_\_\_\_\_

*Moved:* \_\_\_\_\_ *Second:* \_\_\_\_\_

*In Favor:* \_\_\_\_\_ *Opposed:* \_\_\_\_\_ *Abstained:* \_\_\_\_\_

*Witnessed:* \_\_\_\_\_

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Check all that apply.

GPC1312a-jl

<http://portal.sanbag.ca.gov/mgmt/committee/gpc/gpc2013/gpc1312/AgendaItems/GPC1312a1-jl.doc>

habitat preservation/conservation. Much has already been done for habitat preservation and conservation in San Bernardino County, but more needs to be done in certain geographic areas, and the jurisdictions within the county seek to accomplish this in a comprehensive way. This project will help guide the Environment Element Group to achieve a set of possible approaches for the next step.

For Fiscal Year 2013-2014 (FY 13/14), a budget of \$300,000 was allocated to the Task No. 0404 for "Contributions/Sponsorships" in anticipation of providing the local match portion of grants awarded under the Southern California Association of Governments (SCAG) Sustainability Program and the Caltrans Transportation Planning Grant program. SANBAG submitted five proposals for the SCAG Sustainability Program and one proposal for the Caltrans Planning Grant program. SANBAG was informed that four out of the five SCAG proposals have been selected to receive funding in FY 13/14. In addition, SANBAG was successful in receiving the Caltrans Planning Grant for the project Vision and Implementation Strategy for Sustainability in the San Bernardino Metrolink Corridor. However, to streamline the procurement and budgeting process, SCAG staff proposed a funding swap that would allow SCAG to fund almost all the local match portion of the Caltrans Planning Grant and allow SANBAG to fully fund and administer the Countywide Habitat Preservation/Conservation Framework, with a \$70,000 budget. As a result, SANBAG will be administering the procurement process for this project, which had been previously awarded under the SCAG Sustainability Program. The project work effort and the FY 13/14 budget will not be affected by the proposed changes in the procurement process.

SANBAG will seek consultant support to complete the study based on the approved scope of work. Based on SANBAG policy, the Executive Director has the authority to release the Request for Proposals for this transportation study. However, the project was not explicitly listed in the Fiscal Year 13/14 budget, as it was originally expected to be a SCAG RFP. Staff recommends that Request for Proposals No. 14113 and the associated scope of work be approved for release. Per SANBAG Contracting and Procurement Policy 11000, revised May 1, 2013, the Executive Director will execute a contract with the consultant selected by the procurement evaluation panel.

**Financial Impact:** Although not directly referenced as an expenditure item under Task No. 0404 Subregional Transportation Planning, this item is consistent with the proposed Fiscal Year 2013/2014 as described above.

**Reviewed By:** This item is not scheduled for review by any other technical advisory committee or policy committee.

**Responsible Staff:** Josh Lee, Transportation Planning Analyst

**DEVELOPMENT OF A SAN BERNARDINO COUNTYWIDE HABITAT  
PRESERVATION/CONSERVATION FRAMEWORK**

**Scope of Work**

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**SUMMARY OF PROJECT**

This project to develop a Countywide Habitat Preservation/Conservation Framework is an outgrowth of the San Bernardino Countywide Vision, initiated in 2010, driven by community input and endorsed by the County of San Bernardino and the 24 cities in the County. Much has already been accomplished for habitat preservation and conservation in San Bernardino County. This RFP requests assistance to build on these efforts by structuring a more comprehensive countywide framework for habitat preservation/conservation going forward. The objective is to structure this comprehensive approach in a way that is a “win-win” for the health of the environment, the economy, and the citizens of San Bernardino County.

**CONTEXT OF THE HABITAT PRESERVATION/CONSERVATION  
FRAMEWORK: THE COUNTYWIDE VISION**

The San Bernardino Countywide Vision has been endorsed by the County of San Bernardino and the cities in the County and was adopted by the SANBAG Board of Directors in June 2011.

The Countywide Vision Statement is:

“We envision a complete county that capitalizes on the diversity of its people, its geography, and its economy to create a broad range of choices for its residents in how they live, work, and play.

“We envision a vibrant economy with a skilled workforce that attracts employers who seize the opportunities presented by the county’s unique advantages and provide the jobs that create countywide prosperity.

“We envision a sustainable system of high-quality education, community health, public safety, housing, retail, recreation, arts and culture, and infrastructure, in which development complements our natural resources and environment.

“We envision a model community which is governed in an open and ethical manner, where great ideas are replicated and brought to scale, and all sectors work collaboratively to reach shared goals.

“From our valleys, across our mountains, and into our deserts, we envision a county that is a destination for visitors and a home for anyone seeking a sense of community and the best life has to offer.”

The Countywide Vision identified the following elements of a complete, sustainable community: jobs/economy, education, housing, public safety, infrastructure, quality of life, environment, wellness, and image. The community's input on the Environment Element was summarized as follows:

- "Our location and natural environment are two of our great strengths. We must protect and preserve the terrain and natural amenities with which we are blessed. We shall strive to intelligently manage our resources for habitat preservation, recreation opportunities, resource extraction, alternative energy, future growth, water quality, air quality all within a regulatory framework that does not impede the creation of a sustainable economy.
- "We have the opportunity to improve our region's self-reliance in meeting the needs of our own population, utilizing alternative and renewable energy sources; enhancing water management; encouraging green manufacturing; rewarding sustainable building, and conserving natural resources – all leading to a healthy population with a high quality of life."

Following the adoption of the Countywide Vision, community stakeholders were convened to identify priorities and action items for the elements of complete and sustainable communities. These stakeholders formed Countywide Vision Element Groups. Two initiatives have been identified by the Environment Element Group. The first initiative is to compile an inventory of "best practices" that can be used by local governments, special districts, and resource agencies to better facilitate the development review process of proposed projects. That activity is underway.

The second initiative is to develop a more comprehensive approach to the preservation/conservation of habitat and open space throughout the county. Although some areas of the county already have vast open space/conservation land, conservation planning traditionally has taken place on a more isolated basis, without a comprehensive view of habitat preservation opportunities and priorities countywide.

This project will support the Environment Element Group's second initiative by structuring a more comprehensive approach to habitat preservation/conservation. Much has already been done for habitat preservation and conservation in San Bernardino County, as illustrated in our recently completed environmental survey provided to SCAG. But more needs to be done in certain geographic areas, and the jurisdictions within the county seek to accomplish this in a more comprehensive way. It may or may not be appropriate to achieve this in a large initiative similar to the multi-species habitat conservation planning effort such as in Riverside County. Alternatively, a series of smaller, more focused efforts in the context of a set of overall strategic principles could be the most effective approach. This project will help guide the Countywide Vision Environment Element Group to an achievable set of next steps within this broad spectrum of possible approaches.

## **STUDY OBJECTIVES**

The objectives of this project are to:

- Work with the stakeholder group established for the Environment Element of the Vision to develop a countywide habitat preservation/ conservation framework. The framework will include principles that guide habitat conservation/preservation within logical subareas of the county.
- Build on conservation/preservation initiatives already established or in progress, beginning with an inventory of those initiatives.
- Develop the framework in a way that meets regulatory and legal requirements and provides balance among the various environmental, lifestyle, and economic needs and interests represented in the county.
- Identify subsequent steps and commitments that would be necessary to proceed with further development of the framework, including identification of gaps and processes for establishment, restoration, and maintenance of preserves and habitat conservation areas.

It is anticipated that this study will be completed in 9 months from Notice to Proceed. However, this needs to be coordinated with mapping that will be performed by SCAG and SANBAG, and further conversations with SCAG staff will be necessary.

## **STUDY TASKS**

Work tasks to be performed as part of the study include:

1. Project management
2. Document existing preservation/conservation efforts and gaps therein
3. Establish geographical subareas around which to organize the habitat preservation/conservation framework
4. Establish habitat preservation/conservation principles applicable countywide and by subarea
5. Define next steps and commitments necessary to implement the framework
6. Document the study results

Each task is described in more detail below.

### **1. Project management**

#### **Task 1.1: Project Kick-off Meeting**

- SANBAG, County of San Bernardino, Environment Element Group, and the consultant will hold a kick-off meeting to discuss project scope, outreach, and expected project outcomes. A meeting summary confirming project goals, objectives, data collection needs, and outreach approaches will be developed and documented.

#### **Task 1.2: Staff Coordination**

- Monthly face-to-face project team meetings with consultants to ensure good communication on upcoming tasks and to ensure that the project remains on time and within budget. It is anticipated that meetings of the Environment Element Group will be held up to four times throughout the project process. The Environment Element Group consists of a cross-section of staff from local agencies, state and federal resource agencies, environmental stakeholder groups, and the private sector.

**Task 1.3: Invoicing and project reporting**

- The consultant may bill SANBAG monthly for project expenses incurred. A brief progress report shall be provided together with each invoice.

## **2. Document Existing Preservation/Conservation Efforts and Identify Gaps**

As indicated earlier, a substantial amount of land has already been devoted to open space and conservation in San Bernardino County. With a few exceptions, agencies have largely worked independently on these initiatives. One of purposes of this task is to document existing open space/conservation areas, conservation/mitigation activities underway, and opportunities identified by San Bernardino County agencies for additional open space/conservation efforts. The focus of this effort is on areas with habitat value, although recreational value is a consideration.

The consultant shall conduct an inventory of these activities through the following:

- Examination of mapping and auxiliary information available at SCAG, SANBAG, County of San Bernardino, and state/federal resource agencies documenting existing conservation lands, conservation easements, critical habitat, mitigation banks, and related designations intended to preserve habitat for endangered and threatened species.
- Surveys and interviews with local jurisdictions, water and flood control districts, the development community, and other entities identifying the following:
  - Conservation/mitigation activities and documents underway including habitat conservation plans, preserve management/monitoring plans, and general plan open space elements
  - Mapping and documentation of conservation lands not otherwise identified above
  - Quantify habitat conservation lands sequestered/protected through various tools to date in the county in relations to the goals identified in the plans
  - Anticipated future mitigation needs and gaps by species type
  - Based on currently identified gaps and mitigation tools used in the county, estimate future habitat conservation and preservation needs in developable areas
  - Estimates and quantification of the projected conserved and preserved lands should be coordinated with the SCAG habitat mapping project (referenced below) and organized by logical subareas.
  - Maintenance and monitoring of existing conservation areas

- Summary of relevant best practices from other regional entities
- Identification of issues, opportunities, gaps, and concerns associated with current approaches to habitat conservation including current regulatory framework related to the Endangered Species Act (ESA) and its permitting process.

Although the proposed study is not scoped to be data-intensive, it will assemble relevant information that is readily available. This will be done in partnership with SCAG and its environmental consultant working on mapping for the region under the contract “Regional Habitat Conservation – Assessment Methodology & Database for 2016 RTP Development.” A substantial amount of information is available through prior efforts and existing GIS coverages maintained by SCAG, the County, SANBAG, and State/Federal resource agencies. The selected consultant will be responsible for identifying data that can be assembled within the available project resources. No new field data collection or data analysis is being requested.

SCAG’s existing contract noted above is expected to be a vehicle for mapping the following:

- Existing open space/preservation/conservation areas
- Existing and potential mitigation banks
- Aquatic and biological resources
- Federally designated critical habitat
- Other geographically definable biological initiatives

To the extent possible, covenants and conditions governing preserved habitat and conservation areas will be collected and linked with the mapping. SCAG’s consultant will be responsible for the GIS mapping, but the SANBAG study consultant will need to coordinate closely with SCAG to identify appropriate data for inclusion and to provide quality assurance. The nature and extent of mapping available from SCAG will need to be negotiated as part of the definition of the final consultant scope of work, and the full extent of SCAG’s mapping may not be available within the timeframe of the proposed study. However, SCAG and SANBAG will collaborate on both efforts to make as much of the mapping available to the consultant as possible.

The consultant for this study will be responsible for distributing and/or presenting the SCAG mapping to the Environment Element stakeholder group and to the SANBAG Planning and Development Technical Forum (PDTF), which consists of local jurisdiction planning/community development directors.

**Deliverables:**

- Inventory report on existing conservation lands, gaps, and documentation of local and private sector perspectives on habitat conservation
- Regulatory overview of ESA and its permit structures related to San Bernardino County and local jurisdictions responsible for administering various development and transportation projects

- Environmental GIS coverages coordinated through SCAG and designed to inform subsequent tasks.

### **3. Establish subareas around which to organize the habitat preservation/conservation framework**

The geography and environmental settings of San Bernardino County are highly diverse. Part of the development of the framework will include the structuring of this geography into logical subareas based on environmental and habitat characteristics. Factors to consider include climate, level of existing and planned urbanization, and subarea biology, among others. The consultant will assist the Environment Element stakeholder group and PDTF with the subarea designations and will work with SANBAG and SCAG to provide mapping of those areas. The consultant will provide written descriptions of the characteristics of each area based on existing conditions research from task 2. The consultant will estimate build-out of currently known habitat conservation plans and other habitat mitigation efforts. The consultant will qualitatively identify habitat types that are most critical, sensitive, and in need of set-asides for the future.

Key issues within each subarea will then be defined. This will be done through one or more working sessions with the Environment Element stakeholder group and with the PDTF. The key issues will be documented in a technical memorandum.

#### **Deliverable:**

- Technical Memorandum defining the subareas and the characteristics of and key issues/opportunities within each subarea.

### **4. Establish open space/conservation principles applicable countywide and by subarea**

The consultant will work with the Environment Element stakeholder group and PDTF to craft a set of open space/conservation principles at both a countywide and subarea level. The principles will constitute the foundation of a framework for moving forward on a more comprehensive approach to habitat preservation/ conservation. The principles will take into consideration existing and ongoing initiatives, with a view to establishing a path forward for preservation/conservation at both a subarea level and countywide. The consultant will conduct a qualitative survey of cities and County to identify interest in supporting alternative habitat conservation and preservation strategies.

It is recognized that each subarea may require a different approach and that each approach cannot be fully vetted in this planning study. However, the desire is to structure these principles as a basic framework for moving forward in a way that is appropriate for each subarea. Stakeholders specific to each subarea may need to be convened to develop the subarea-specific principles, and the consultant will help facilitate those discussions, as appropriate.

The conservation/preservation principles identified in this section should reflect the objective of identifying "potential tools" for future conservation. Future tools could include mitigation banking, project review under CEQA, HCPs, MSHCPs, NCCPs, density transfers, coordinated City-County-Special District mitigation planning, land acquisition, and others.

Deliverable:

- Technical memorandum on countywide and subarea habitat preservation/conservation principles

## **5. Define next steps and commitments necessary to implement the framework**

It will be important to conclude this planning study with momentum to proceed to the next level, however that next level may be defined. Next steps will be identified at both the countywide and subarea level, and associated agency responsibilities and schedule will be outlined. Financial and personnel resources believed to be needed will be outlined as well. This needs to be a feasible path forward, and consultation will be needed with elected officials, local agency staff, resource agencies, environmental stakeholders, and the development community to ensure that the direction can be supported. Draft next steps will be presented to the Environment Element stakeholder group, PDTF, and SANBAG policy committees. Comments from these groups will be considered as the study report is prepared.

Deliverable:

- Notes on next steps defined by stakeholder groups, to be included in the final report.

## **6. Document the study results**

A draft report will be prepared documenting the results of Tasks 1-5 in the form of a habitat preservation/conservation framework and next steps. The report will reference the inventory, data, and mapping assembled in the course of the study, but the actual mapping products will be prepared as part of the SCAG environmental mapping effort. The timing of this proposed study and the SCAG study will need to be coordinated. The SANBAG GIS Department will also be available to assist in preparing mapping products. A draft of the report will be made available to the Environment Element stakeholder group for review and comment, following which a final report will be prepared.

Deliverable:

- Draft and final study reports

## **COST AND SCHEDULE**

Cost of consultant contract:                      \$70,000

The target schedule for completion is 9 months, with a February 2014 start date for the consultant contract. This relatively aggressive schedule will help the Environment Element stakeholder group to focus its efforts with a specific end result in mind. The target for completion of the draft report will be 6 months. The schedule for intermediate study milestones is identified below:

1. Project management – Initiation in month 1, with ongoing project management
2. Document Existing Preservation/Conservation Efforts – completion by month 3
3. Establish subareas and identify countywide and subarea issues – Completion by month 4
4. Establish habitat/conservation principles applicable countywide and by subarea – Completion by month 5
5. Define next steps and commitments necessary to implement the framework – completion by month 6
6. Document the study results – Draft final report completion by month 6, followed by stakeholder review and delivery of final report by month 9

Three months are being allowed between the draft and final reports for circulation and review/comment by a broad range of stakeholders and for presentations to elected officials at SANBAG committees.