Selection Panel (Primary) Review

X Fund (a proposal recommended for funding at the amount sought or funding in part of selected project tasks or subtasks)

− ***Reconsider if Revised*** (a proposal that is a high priority but that requires some revision followed by additional review prior to being recommended for funding)

− ***Not Recommended***

Amount Sought: $235,000

Fund This Amount: $***235,000***

Conditions recommended (Conditions that applicants would need to meet to obtain funds may be recommended for proposals suggested for either full or partial funding. For proposals recommended for partial funding, conditions that identify the funded tasks or subtasks must be recommended.)

Several concerns were raised by reviewers concerning the projects budget. Final approval of funding for this project should be conditioned on the applicants successfully providing detailed budget information addressing deficiencies identified in the budget review. According to the proposal, the California Department of Transportation provided $185,000 to complete regulatory compliance monitoring, but the applicants feel they need another $50,000 to fully implement the previously funded monitoring plan. The funding agency should confirm with CalTrans that the $50,000 requested in this proposal to implement the CalTrans funded monitoring plan is a reasonable investment of State funds. If the Science Program approves funding for a related proposal titled "Integrated Regional Wetland Monitoring (IRWM) Project", then final approval of funding for the Petaluma Marsh expansion monitoring project should also be conditioned on reconciling the budget for this effort with the budget for the related request before the Science Program, to ensure that funding is complementary and not duplicative.

Please provide a brief explanation of your rating, including an explanation of the reasons for any conditions that the panel recommends. Revisions required of proposals recommended for reconsideration should be outlined, together with a justification for the suggested revisions:

This proposal seeks additional funding for a California Department of Transportation funded monitoring plan and to participate in efforts proposed to occur in a second phase of the Integrated Regional Wetland Monitoring (IRWM) Project. The proposed project would monitor a variety of processes and habitats immediately following implementation of an

ERP−funded restoration project. The proposed project would allow the applicants to include the Petaluma Marsh expansion project as a "secondary test site" for the IRWM project. The IRWM project was previously funded by the CALFED Science Program to develop and refine wetland monitoring approaches. A separate proposal requesting funding for the second phase of the IRWM project was submitted in response to the Science Program solicitation, and is currently under review by the Science Program. Although the value of the proposed project would be enhanced if the IRWM−2 project is funded, the proposed project would provide valuable data without the larger IRWM−2 project being funded. In addition, the Petaluma River is identified in the Monitoring and Evaluation PSP as an area where the ERP has undertaken significant restoration actions. The Technical Panel rated this proposal above average, but noted that the budget review found the budget detail inadequate. The Selection Panel recommends this proposal for funding, conditioned on the applicants successfully providing adequate budget detail and that the funding agency address coordination with CalTrans and the CALFED Science Program.

The Selection Panel was concerned about the limited biological sampling and recommends that the applicants consider Technical Panel comments concerning whether mobile fish and birds would be adequately sampled as the monitoring proceeds.

Technical Panel (Primary) Review

above average

Explanation Of Summary Rating

The external technical reviewers and the technical panel liked the two−tiered approach to monitoring that the project would accomplish, linking a specific tidal restoration project to an effort to develop a regional monitoring protocol. However, there were concerns with respect to adequacy of a single year of fish sampling, the lack of pre−restoration monitoring and the lack of a reference site in the ancient marsh. Although the budget lacked detail and some labor rates were high, the team is composed of successful members. Full value of the project seems to be dependent upon IRWM Phase II funding. If IRWM Phase II funding does not occur, the technical review panel would retain the "above average" rating for the tasks of monitoring channel development as well as a natural reference site.

Review Form

Goals And Justification

The proposal seeks funds to augment a previously funded monitoring plan and participate in a test of monitoring protocols of the IRWM. The restoration of 110 acres to tidal marsh is described and monitoring of all aspects of site responses are planned under the IRWM (from tide and channel changes to vegetation, fish and bird responses). The IRWM provides a useful conceptual model, though most technical reviewers complained that details were lacking, especially for this site, where hydraulic scour is needed to supply the preferred hydrology to the marsh. Hypotheses were not stated, though the detailed sampling plan allowed most external reviewers to invent hypotheses appropriate for the site. A large part of the project will be testing and calibrating the IRWM methodologies and model, rather than addressing site−specific questions; both are justified.

Approach

The approach for the site−specific and regional monitoring effort is carefully planned and appropriate for the questions posed. There is some mention of collecting data off site for channel development, but no mention of reference sites. The technical review panel recognized Carl's Marsh as a primary evaluation site for the IRWM. However, they felt evaluation of the Petaluma restoration should include a reference site, perhaps from the ancient marsh, so the goal for the restoration is tracked.

This will be the first monitoring for the restoration site (although pre−construction monitoring would have been preferred), but the IRWM program builds upon Phase I and is a necessary step for regional use of the integrated monitoring protocols. The monitoring activities are likely to make an important contribution to our knowledge about restoration and appropriate methods.

Feasibility And Likelihood Of Success

The monitoring plan was described in enough detail so external reviewers agreed it is technically feasible and has a high likelihood of success. The spatial and temporal scales fit for both project components (site−specific and regional monitoring).

The Bay Regional Panel review indicated the construction needs to be completed prior to project start, but the construction should be completed by 2006 at the latest. If IRWM does not win Phase II funding, the panel was concerned that the regional value of the monitoring would be largely lost. The environmental compliance review had a concern that the water level recorder would require a CEQA document (1602 streambed alteration agreement). They also found that ESA documents would be required and should be applied for soon.

Performance Measures

Specific performance measures were not included for evaluation of the project using the monitoring data. Performance measures listed on page 16 (e.g., ‘Data is collected on schedule’) are not appropriate. However, some external technical reviewers found the metrics described in the methods adequate to assess the site and regional protocol evaluations. The technical panel and external technical reviewers were satisfied that the data would be able to test questions concerned with the physical and vegetative development of the marsh, but one external technical reviewer was concerned that the mobile communities of fish and birds would be under−sampled.

Products

The external and technical panel reviewers agreed that the project would provide valuable information for the region for both the site−specific as well as the regional IRWM results. The project shows appropriate and valuable links to other projects, and the team includes involvement from NGOs, academia, agencies and consultants. Data access will be through the web at a established portals (MAS, SFIE, IRWM).

Capabilities

The team is diverse and has appropriate backgrounds for the tasks. The members have excellent track records and are well qualified to complete the project.

Budget

The budget is essentially a set of subcontracts and is not sufficiently detailed to evaluate. The costs for labor are very high, but most reviewers felt the budget was appropriate for the broad sampling plan.

Regional Review

The regional panel review liked the project and ranked it as ‘high’ because it would support evaluation of a CALFED restoration project and help validate IRWM. (But their ranking also depended upon IRWM Phase II funding. Without Phase II, their rank drops to ‘medium’.) The project has good links to other actions, local involvement and value, and has provided for data access.

Administrative Review

Two prior−phase funding reviews found no problems with the contracting agency. The environmental compliance review indicated CEQA documents might be required for the water level recorders and ESA permits will be required, but found no critical issues. The budget review found the detail inadequate and a revision will need to include breakdowns by task, subcontract, equipment and overhead details. The review also suggested the budget was low for the scope of the project.

Additional Comments

Technical Review Panel's Overall Evaluation Rating:
above average

Bay Regional Review

High

Review:

1. ***Applicability to ERP goals and regional priorities.***

We gave the proposal the highest marks regarding applicatbility to ERP. It monitors and evaluates a CALFED funded restoration project (Petaluma Marsh Expansion Project (PMEP)) in a tributary of the Petaluma River to restore tidal wetlands to support endangered species, including several "Big R" CALFED. It monitors and evaluates progress to MSCS milestones, stressors and restoration outcomes. Since the restoration project is only starting and this will be monitoring at the beginning of restoration, the physical components are most important if funding is limited. However, since it is a part of IRWM, we understand that the integrated monitoring is appropriate. Also, there is a planting component to the restoration project and it is unclear if the botanical monitoring will be as useful as monitoring several years later along the restoration curve.

2. ***Links with other restoration actions.***

Again we gave the proposal high marks (with qualification at end)for links to other efforts. The project is essentially an extension of the Integrated Regional Wetland Monitoring Project (IRWM) with application to the PMEP. While the specific proposed monitoring is of a single site, it helps assess cumulative responses of several related restoration actions since that is a central thesis of the IRWM. The data will be stored and accessible from SFEI and a website has been created for this purpose as part of IRWM, both for public info and for data exchange. It directly addresses all the other questions above, being an extension of funded monitoring, becuase it allows other PMEP monitoring funds to provide long−term information. It appears to fill a gap by providing detailed monitoring, beyond basic regulatory requirements, to look at restoration outcomes. For example the project would track outboard channel erosion over time, within the context of conceptual models of ecosystem function. Information generated by the project should be useful for monitoring of the restoration project. It will create monitoring capacity by expansion of IRWM, and may help provide insight on how to tailor monitoring of future restoration actions. One potential downside is that if the IWRM II is not funded, then this monitoring may not provide as much regional benefit because the integration with other areas would go away and this would only be intensive monitoring of the early stages of a smaller restoration project. At least the physical monitoring would be worthwhile even if the larger project is not funded, but the rating would only be at a medium level if IWRMP II is not funded.

3. ***Local Circumstances.***

The monitoring cannot begin untill the restoration is completed. The restoration is underway and expected to be done in late 2005, or 2006 at the latest, if there is heavy rainfall in this period. There was some issue with a railroad right of way, which appears to be resolved. The applicant includes written access documents from private landowners. The site is not available for use by the public and no opposition is noted.

4. ***Local involvement.***

Since the applicant is the landowner, which happens to be a local nonprofit active in regional restoration, local involvement is integral. All necessary permits have been secured. The site is not readily accessible by the public and no opposition is noted. As noted, a website has been created and Marin Audubon will discuss it in newsletters. With a match of monitoring funds from CALTRANS that goes well beyond the CALFED grant program, this will endure beyond the life of the the grant.

5. ***Local Value.***

Again we rated the proposal highly in regards to local value, at least in contributing to the IRWM, which is directly related to all these goals. Since CALFED funded IRWM the main question is whether this expansion is of sufficient added value to warrant funding. Therefore, the technical team should assess how much additional benefit is derived from the expansion. The applicant states that the site will be used to help validate models derived from monitoring of other sites. Again, if IRWM II is not funded/ then most of that benefit will be lost. Another question is whether the early restoration monitoring will have high utility. We believe it will, at least for physical parameters.

6. ***Other comments:***

It appears that the grant may be partly intended to ensure that Marin Audubon can meet regulatory monitoring requirements. Since they have $185,000 from CALTRANS for monitoring CALFED is helping to meet regulatory monitoring requirements. The application estimates that $50,000 will be to ensure regulatory compliance. This should be acceptable as this is a CALFED funded restoration project, rather than some third party mitigation project. Also the applicant would shift some available CALTRANS funding beyond the three year CALFED grant funding limit and backfill the funds w/ CALFED funding. We are unsure if this creative approach is problematic for CALFED. It does leverage longer−term monitoring that is beneficial to ERP.

Overall Ranking:

High

Provide a brief summary explanation of the committee's ranking:

The project expands the IRWM and addresses almost every goal and value we were charged with evaluating. Our main reservations are its linkage to future funding of IRWM II, that monitoring will be for a very early stage of restoration and the fact that the restoration site is not completed. However, the restoration is in construction, appears to be making good progress and the project will have utility towards CALFED goals even if IRWM II is not funded, at least for physical parameters.

We would rank this proposal as a "medium" if IRWM II is not funded.

External Technical Review

Goals And Justification

Does the proposal identify the restoration actions whose outcomes will be monitored?

The authors propose to augment current monitoring of the Petaluma Marsh Expansion Project. The proposed monitoring is currently funded in part ($185,000) by CalTrans. Among other activities, this restoration involves the breeching of two levees to restore tidal flow to 110 acres of diked land, adjacent to 71 acres of tidally influenced wetland. This area is bordered on one side by the ancient Petaluma Marsh. This newly restored wetland would serve as a secondary site within the greater IRWM network of sites.

Does the proposal present a clear and internally consistent statement of the goals and objectives of these restoration actions?

Yes, the proposal clearly describes the goal of the previously−funded restoration activities. The two main goals are to restore maximum possible acreage of diked marsh to tidal action to restore saline emergent wetlands and to increase habitat available for species of concern, including the clapper and black rails, harvest mouse, yellowthroat, song sparrow, salmonids, splittail and other migratory and shore birds. This secondary site would serve as a test area to validate the results of the IRWM I study, which identified important parameters to be measured during monitoring and fostered the creation of a predictive model. The PMEP allows the evaluation of this model at a site that is unique in its proximity to a large ancient marsh during the very early stages of restoration.

Does the proposal present a clear conceptual model that adequately explains the underlying basis for the restoration actions?

The conceptual model presented integrates interactions among the component parts of the system, physical and biological, on both a small and regional scale. It would have been helpful if there was more detail on the predictive model generated by IRWM I, although I imagine this may have been difficult given the space restrictions. The authors present an example of their conceptual model using salinity as a potential driving force and discuss how salinity may act at different spatial and temporal scales.

Does the proposal clearly state the hypothesis(es) that the proposed monitoring will test?

At one point it is suggested that the proximity to an ancient marsh may speed the colonization of the restored area by native species, particularly rare or uncommon species. Another potential hypothesis is that this restoration action will behave in a similar fashion to other

restorations assessed as a part of IRWM I. However, I could not find a clear statement of the hypotheses tested by the proposed monitoring.

Are these hypotheses justified relative to existing knowledge and knowledge gaps? The proposed monitoring will provide a valuable validation of the large−scale modeling efforts resulting from the first phase of this project. It will also show what role ancient marshes may play as the local source of organisms and/or seeds.

Approach

Is the approach well−designed and appropriate to meet the project's objectives? Does the project adequately build upon previous monitoring, including appropriate modifications to respond to lessons−learned during the prior monitoring?

Following the restoration of tidal action to the marsh, a large suite of biological and physical parameters will be measured within the PMEP system. The approach seems very well designed and is based upon the authors' previous research and monitoring.

Are the monitoring and evaluation activities described in the proposal likely to make significant contributions to our knowledge−base? If so, please describe the contributions and their significance. Will these contributions be useful to decision−makers?

The outcomes of this project will contribute to our knowledge of how tidal marshes respond immediately following the restoration of tidal flows. A validation of the model created as the outcome of the previously funded IRWM is also a significant contribution to our understanding of how applicable this model is to other marshes within the estuary.

Technical Feasibility

Is the project fully documented and technically feasible? Is the scale of the project consistent with the objectives?

Yes, the authors have provided a thorough description of the parameters to be measured and an adequate timeline. The scale of the project is consistent with the objectives and given the large number of investigators should be feasible.

Performance Measures

Will the data collected by the proposed monitoring allow evaluation of the restoration actions that are being monitored? Are specific performance measures proposed for evaluating these restoration actions? Is the rationale for the performance measures clearly demonstrated?

The authors detail a series of performance measures, which include: physical processes, landscape ecology, plant communities, bird communities, fish and invertebrate communities and primary productivity and nutrients. Many restoration activities monitor only a subset of these. This suite of measures should provide a valuable, comprehensive assessment of the initial trajectory of restoration. The data on biotic community structure should give an early assessment of the success of the restoration, the physical parameters will provide insight into the pathways of restoration and the landscape data should act to tie together both physical and biological data. The authors are measuring a large suite of factors, but it seems that all are necessary at this stage to provide a thorough evaluation of both the predictive model and the success of the restoration.

Will these data and performance measures allow evaluation of the conceptual models underlying the previous restoration actions?

Yes. The data captured from this restoration will allow evaluation of the conceptual model of local restoration potential as well as validation of the regional model.

Is the monitoring and evaluation plan explicit and detailed enough to assess the performance of the restoration actions?

Yes. As stated above, the authors have provided a detailed description of the proposed monitoring.

Products

Will the project lead to information that is useful to resource managers, other decision makers, and/or scientists?

Yes, the validation of an existing model is an important contribution to our understanding of restoration. It will also be interesting to evaluate the progress of restoration of a marsh in close proximity to an ancient “source” marsh. If colonization of newly restored habitat occurs more rapidly, this could serve as an important predictor of restoration success at other sites.

Does the project explicitly describe how others will be able to access the data produced by this monitoring effort?

The authors state that the results of the monitoring will be made available on the IRWM website. The primary data that will be made available are the landscape images. Are data handling, storage, and dissemination measures adequate to allow resource managers, other decision makers, and scientists to access and use the project’s results?

Yes, I believe so.

Is the project designed to produce high−quality results that are likely to stand up under peer−review?

Yes, these results should stand up under rigorous peer−review.

Capabilities

This is an interdisciplinary team of researchers that has worked successfully together in the past. Their qualifications are excellent.

Budget

The majority of the budget is subcontracts and the budget justification does not provide sufficient detail to assess whether or not the funds are adequate. Given the amount of work proposed, it does seem to be a reasonable budget.

Additional Comments

External Technical Review

Goals And Justification

This proposal clearly identifies the restoration action as the Petaluma Marsh Expansion Project (PMEP) and the goals of the restoration action are clearly defined. Although there is no clear conceptual model for the restoration actions, the proposal follows the conceptual models of system interaction and response developed by the Integrated Regional Wetland Monitoring Project (IRWM). No hypotheses are identified.

Approach

The approach is well−designed and appropriate to meet the objectives. The approach follows the IRWM. The detailed monitoring proposed is likely to make significant contributions to the science of wetland restoration. This fully integrated approach should give excellent information to improve the design of wetland restoration efforts. These contributions will be very useful for decision makers.

Technical Feasibility

This project is technically sound.

Performance Measures

The emphasis of this project is on improving monitoring protocols and less on the evaluation of the restoration actions that are monitored in the process. As such the project will undoubtfully develop performance measures. The authors of this proposal seem to prefer to use the term metrics instead of performance measures. Several metrics are identified in the proposal. This project will collect data that will be used to improve the conceptual understanding of wetland ecosystems.

Products

The proposal includes detailed plans for dissemination of the results, through a website, public meetings, and press releases.

Capabilities

The team seems to be capable to reach the projects goals. Performance measures for the project are clearly identified.

Budget

The budget is reasonable and adequate for the work proposed.

Additional Comments

External Technical Review

Goals And Justification

The proposal clearly identifies the restoration action whose outcomes will be monitored (Petaluma Marsh Expansion Project). The proposal does present a clear and consistent statement of the goals and objectives of the restoration activities. The conceptual model is adequate in describing the underlying basis, although much more detail could have been incorporated to better convey the basic concept and linkages of the particular tidal marsh/wetland that will be studied. I assume that this was done in previous CALFED proposals. No clear hypotheses are presented for the proposed study, however given the nature of the study to provide background data for future time comparisons, it does not appear to be neccesary. The study is justified given the knowledge gaps and existing knowledge and will allow for additional insight into the ecological benefits and physical function of tidal wetland habitats in the San Francisco Estuary (SFE). This is especially important given the CALFED goal of increased tidal wetland restoration in the SFE.

Approach

The approach appears to be well thought out and designed and should allow for meeting the projects objectives. The broad monitoring approach proposed (sediments − nutrients − primary production − vegetation − terrestrial biota − aquatic biota)will provide a significant contribution to our understanding of how tidal wetlands contribute to the larger SFE system. The proposed project does build upon previous monitoring (BREACH and IRWM)and it is assumed that it relies upon tested and proven methods. One area which will be particularly useful is in the estimation of primary productivity occurring in the study area. The SFE, as mentioned has lost a significant component of its tidal wetlands habitat. It also appears to be, for a number of reasons, low in overall productivity as measured by abundance of zooplankton and fishes, especially in recent years when compared to historical data. Given the widely reported high productivity of tidal wetlands (various pubs), future tidal wetland restoration will likely play a significant role in the recovery of the SFE system, but this remains to be seen. This proposed study, by increasing our understanding of function and role of tidal marsh habitats, will go a long way in describing the ecosystem benefits of tidal marsh habitats and what we can expect to gain from creating additional tidal wetland habitats. This will be of great interest and use to decision makers in this system. This proposed project will be particularily important given that the researchers will have the ability to capture and monitor the community that moves into/utilizes the newly created PME. Many of the restored marshes/wetlands in the SFE were created long ago thus we don't know the evolution of features and community that occurred within.

One limiting factor of the proposed study, from at least the biological community standpoint is that it will be a single snapshot (1 year study in only two seasons) of what species utilize the restored habitats. It is generally assumed that restored habitats continuously change as do the communities assocated with them. Therefore the sampling in the PME will provide a great opportunity for an early stage assessment of species use that can be compared with future monitoring studies, however, at least for the avian and aquatic community, the duration and frequency of the proposed study (2 or 3 sampling events in one year) may have limited utility. No follow up studies for the biological sampling are listed in the work plan (appendix A). From my personal experience sampling in the SFE, the aquatic community is highly variable across years and within years, so interpretation of biological data in the proposed study will need to be done carefully.

Technical Feasibility

The proposed project is fairly well documented and appears to be feasible, especially given the authors prior experience with similar habitats elsewhere in the SFE and the well coordinated and executed planning and implementation of the restoration project. The scale of the project, especially when combined with the other aspects of the IRWM, is consistent with the stated objectives.

Performance Measures

The data collected by the proposed monitoring study will allow for adequate evaluation of the restoration actions especially in regards to the physical attributes and plant community. However, it will be more difficult to successfully evaluate the biological aspects of the study. That being said, it is still critical to collect at a minimum the basic biological baseline. It would have been useful to have more discussion in the proposal on the time frame that the ecological communities usually respond to restored tidal marsh/wetland habitats. The lead investigator is well versed in this regard, yet little mention is made as to why only a single year was chosen and more specifically no discussion as to the best time period (post restoration; 1yr, 2yrs, etc.) for assessing the biological community.

Specific performance measures are listed in the proposal, however they are relatively vague and do not allow the reviewer the opportunity to determine how they might be applied.

In regards to the conceptual model (Figure 1: IWRM with Drivers and Outcomes), the biological data collected by this proposed study will most likely only provide a very general sense of what is occuring in the food web and community and ultimately the ecosystem outcome of the restoration activity, given the limited biological sampling. Isotope studies will aid in determining the linkages, but isotopic signatures at a given point in time are formed from food consumed in the past, so if there is temporal variability in diet, then even this data

may be difficult to interpret.

Products

I believe that this project will lead to useful information that will be helpful for resource managers and others. There are certainly limitations in the data that will be collected at PME, but as part of the larger IRWM study the data will be very useful. The project does state how others will have access to the data (IRWM website, presentations etc) and it appears as if the datahandling, storage and dissemination measures will be adequate to allow resource managers and others access. The project is designed to produce good quality results, especially in regards to the changes in physical features and vegetation, but will provide a more limited assessment of the biological communities utilizing the system given the limited sampling intensity and duration. The results will likley stand up to peer review especially if combined with results from the other IRWM sites as the authors intend.

Capabilities

The project team is highly qualified to carry out the proposed activities. The lead investigator has extensive experience working on similar and adjacent marshes in the San Francisco Estuary therefore is highly capable of performing the stated tasks.

Budget

The budget seems reasonable for the proposed work, although it is a bit vague in describing how funds would be spent and who would be performing what portion of the proposed study.

Additional Comments

The proposed study is a good collaboration between relevant scientists, land managers, and local land owners and will yield some very useful results. The study as proposed is relatively inexpensive (combination of fund sources makes this possible),yet will still provide a solid baseline of the physical components and vegetation, especially given the requested funds for ariel photography that will be key in future long term assessments of project success. The proposed study will provide only limited baseline data on the biological community especially the aquatic community. This is the especially the case given the high variability in catch of aquatic organisms that have been observed in the SFE on an annual, seasonal and monthly to weekly time scale. Aquatic diversity and abundance are likely to be controlled to some extent by internal factors within PME study sites, but more likely will be controlled by patterns of reproduction and recruitment success of the various species in the greater SFE which are usually controlled by climatic and flow/discharge related phenomena. Some general questions in regards to the proposed study: Is a one year study with only 2−3

sampling events (aquatic and avian sampling, respectively) sufficient to characterize the biological community? Given the limited data colletion, can the resultant data be succesfully used to identify linkages in the food webs? Utilizing the data from the proposed study, can the links between physical attributes of the site and biological attributes be linked as suggested in the conceptual model and text, given frequency of collection?

As previously mentioned I am concerned about the timing of the biological sampling. How soon after the physical completion of the project should sampling be initiated in order to provide a true starting point for future comparisons?

Budget Review

1. Does the proposal include a detailed budget for each year of the requested support?
No.

If no, please explain:

100% cost under "consulting" category no detail breakdown except to generally state the hourly rate, no hours.

Since the Scope of Work is detailed in its description of the goals and methods of the study, it seems like there should be a way to estimate labor and other costs fairly easily. But, this proposal doesn't do that. Everything is rolled into Services and Consulting with no breakdown.

Task and Deliverables – Grantee must provide detailed information for all work including subcontractor work for each specific task, services, and work to be performed with the appropriate and corresponding deliverable or end product for each task(s) and/or sub−task(s). Costs associated with each task and deliverable should be evaluated based on what is considered to be reasonable costs for performing similar services.

2. Does the proposal include a detailed budget for each task identified?
No.

If no, please explain:

See above.

3. Are project management expenses appropriately budgeted?
No.

If no, please explain:

No costs are identified for this category.

4. Does the proposal clearly state the type of expenses encompassed in indirect rates or overhead costs? Are indirect rates, if used, appropriately applied?
No.

If no, please explain:

No explanation is provided in this proposal.

Budget Detail/Administrative Overhead Fees – Budget detail combines the labor rates with the direct overhead rate. The labor rate, benefits and indirect rate should be itemized in the format provided by the PSP to enable reviewers to better evaluate and ensure that proposed labor rates are comparable to state rates.

If proposal is funded, a detailed list of items included in the indirect cost rate should provided by the grantee. Grantee must provide itemized and detailed information included and charged as part of Indirect Rates (IDC) charges.

5. Does the budget justification adequately explain major expenses? Are the labor rates and other charges proposed reasonable in relation to current state rates?
No.

If no, please explain:

No major expenses identified.

Major Expenses – If the grantee is awarded a detailed list of equipment purchases should be provided by the grantee so reviewers can better evaluate whether it is more cost effective for the state to purchase large dollar equipment items through the state procurement process. If the equipment list is available within the State inventory or stock, then purchase of some or all of the listed items may be provided, loaned, or leased by the state to the grantee. In the event, that the equipment is purchased by the grantee, the grantee shall maintain an inventory of major equipment for auditing purposes and potential use for future projects. Grantee shall follow State Contracting Manual [SCM] Section 7.61 thru 7.62 rules pertinent to equipment purchase, lease, etc.

Subcontracting – Proposals for work to be performed by subcontractors or other entities in excess of the 25% of the total project dollars the grantee is required to provide a justification for subcontracting services. If subcontractors are pre−selected and identified in the proposals as part of the project team, the grantee should provide a justification on how each subcontractor was selected. Grantee shall identify labor rates and indirect costs rates paid to each identified subcontractor to ensure that labor rates are comparable to State rates.

The Subcontracted work should be identified with a rate and hours and attributed to each task

and deliverable for each year. A performance evaluation is also recommended for subcontractors that receive more than 50% of the grant funds. If the subcontractor has not been identified, a position description complete with education level, experience, and abilities be submitted and the rate and hour associated with that position will be attributed to a task, and deliverable. The grantee must also comply with the State competitive bidding process as stated in the PSP.

The Grantee should charge a reduced indirect cost rate to the state for services that will be subcontracted by the grantee. (Researching SCM Section 3.06 B).

6. Are other agencies contributing or likely to contribute a share of the projects costs?
Yes.

If yes, when sufficient information is available, please sum the amount of matching funds likely to be provided:

Cal Trans $185,000

7. Does the applicant take exception to the standard grant agreement's terms and conditions? If yes, are the approaches the applicant proposes to address these issues a reasonable starting point for negotiating a grant agreement?
No.

If no, please explain:

No exception is noted. Stated acceptance of the PSP's T's and C's.

8. Are there other budget issues that warrant consideration?
Yes.

If yes, please explain:

Looking at the scope of work. It looks like they'd need a lot more money to accomplish the objectives even if Ms. Salzman donates all of her time.

Other comments:

Environmental Compliance Review

1. Is compliance with California Environmental Quality Act (CEQA) required for this project?
YES− NO***X***

2. Is compliance with National Environmental Policy Act (NEPA) required for this project?
YES− NO***X***

3. Does this project qualify for an Exemption or Exclusion under CEQA and NEPA, respectively?
YES***X*** NO− N/A−
Comments:

Even though #1 and #2 state "no" I put "yes" on this question because this project could possibly require a 1602 Streambed Alteration Agreement which would require a CEQA document. There is not enough detail about the size or quantity of posts that will be driven into the substrate to install the dataloggers. The applicant should consult with CDFG to determine if a 1602 is required for that task and if so, if it qualifies for an Exemption.

4. Did the applicant correctly identify if CEQA/NEPA compliance was required?
YES− NO***X***
Comments:

See comment #3

5. Did the applicant correctly identify the correct CEQA/NEPA document required for the project?
YES− NO***X*** N/A−
Comments:

Again, there is not enough detail to determine if a CEQA doc. is required. See comment #3.

6. Has the CEQA/NEPA document been completed?
YES− NO***X*** N/A−

7. If the document has not been completed, did the applicant allot enough time to complete the document before the project start date?
YES***X*** NO− N/A−

8. If the document has not been completed, did the applicant allot enough funds to complete it?
YES***X*** NO− N/A−
Comments:

No funds were allocated for this task, but I do not anticipate it to be a complex, costly CEQA document.

9. Did the applicant adequately identify other legal or regulatory compliance issues (Incidental Take permits, Scientific Collecting permits, etc,) that may affect the project?
YES− NO***X*** N/A−
Comments:

Identify those additional permits that may be needed by this project:

a 1602 Streambed Alteration Agreement may be required. If there are state listed Threatened or Endangered species present in the area, CESA compliance will be required.

10. Does the proposal include written permission from the owners of any private property on which project activities are proposed or, if specific locations for project activities are not yet determined, is it likely that permission for access can be obtained?
YES***X*** NO− Project is on public land/water or question is otherwise N/A−
Comments:

11. Do any of these issues affect the project's feasibility due to significant deficiencies in planning and/or budgeting for legal and regulatory compliance or access to property?
YES− NO***X***
Comments:

The applicant must complete the ESA process and obtain the proper permits before monitoring begins.

Prior−Phase Funding Review

Project Title	Petaluma Marsh Expansion Project
CALFED Contract Management Agency	US Fish and Wildlife Service
Amount Funded	$503,635.00
Date Awarded	1999/01/01
Lead Institution	Marin Audubon Society
Project Number	ERP−98−F13

3. Have negotiations about contracts or contract amendments with this organization proceeded smoothly, without persistent difficulties related to standard contract terms and conditions?
Yes.

4. Are the status, progress, and accomplishments of the organization's current CALFED or CVPIA project(s) accurately stated in the proposal?
Yes.

5. Has this organization made adequate progress towards these project(s)' milestones and outcomes, without unreasonable divergences from project schedules or poor−quality deliverables?
Yes.

6. Is the applicant's reporting, record keeping, and financial management of these projects satisfactory?
Yes.

7. If this application is for a next phase of a project whose contract your agency currently manages, will the project(s) be ready for next−phase funding to monitor and evaluate project outcomes in fiscal year 2005/6, based on its current progress and expenditure rates?
Yes.

Other comments:

Prior−Phase Funding Review

Project Title	Bahia Acquisition and Tidal Wetland Restoration
CALFED Contract Management Agency	Resources Agency via GCAP Services, Inc.
Amount Funded	$3,345,000.00
Date Awarded	2003/01/01
Project Number	ERP−02−P14

3. Have negotiations about contracts or contract amendments with this organization proceeded smoothly, without persistent difficulties related to standard contract terms and conditions?
Yes.

4. Are the status, progress, and accomplishments of the organization's current CALFED or CVPIA project(s) accurately stated in the proposal?
Yes.

5. Has this organization made adequate progress towards these project(s)' milestones and outcomes, without unreasonable divergences from project schedules or poor−quality deliverables?
Yes.

6. Is the applicant's reporting, record keeping, and financial management of these projects satisfactory?
Yes.

7. If this application is for a next phase of a project whose contract your agency currently manages, will the project(s) be ready for next−phase funding to monitor and evaluate project outcomes in fiscal year 2005/6, based on its current progress and expenditure rates?
N/A

Other comments: