

Proposal Reviews

#126: East Sacramento County Blue Oak Legacy Acquisition Area-Deer Creek Hills Project

Sacramento Valley Open Space Conservancy

Final Selection Panel Review

Initial Selection Panel Review

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Land Acquisition

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Final Selection Panel Review:

CALFED Bay-Delta 2002 ERP PSP Final Selection Panel Review

Proposal Number: 126

Applicant Organization: Sacramento Valley Open Space Conservancy

Proposal Title: East Sacramento County Blue Oak Legacy Acquisition Area-Deer Creek Hills Project

Please provide an overall evaluation rating.

Fund	
As Is	X
In Part	-
With Conditions	-
Consider as Directed Action	-
Not Recommended	-

Amount: **\$1,000,000**

Conditions, if any, of approval (if there are no conditions, please put "None"):

None

Provide a brief explanation of your rating:

The Fish and Wildlife Service's letter endorses the project and pledges \$200,000 towards the project, confirming the value of purchasing these lands.

Initial Selection Panel Review:

CALFED Bay-Delta 2002 ERP PSP Initial Selection Panel Review

Proposal Number: 126

Applicant Organization: Sacramento Valley Open Space Conservancy

Proposal Title: East Sacramento County Blue Oak Legacy Acquisition Area-Deer Creek Hills Project

Please provide an overall evaluation rating.

Explanation of Recommendation Categories: Fund

- **As Is** (a proposal recommended for funding as proposed)
- **In Part** (a proposal for which partial funding is recommended for selected project phases or components)
- **With Conditions** (a proposal for which funds are recommended if the applicant contractually agrees to meet the specified conditions)

Consider as Directed Action in Annual Workplan (a proposal addressing a high priority action that requires some revision followed by additional review prior to being recommended for funding)

Not Recommended (a proposal not currently recommended for funding-after revision may be considered in the future)

Note on "Amount":

For proposals recommended as Fund As Is, Fund In Part or Fund With Conditions, the dollar amount is the amount recommended by the Selection Panel.

For proposals recommended as Consider as Directed Action in Annual Workplan, the dollar amount is the amount requested by the applicant(s).

Fund	
As Is	X
In Part	-
With Conditions	-
Consider as Directed Action	-
Not Recommended	-

Amount: **\$\$1,000,000**

Conditions, if any, of approval (if there are no conditions, please put "None"):

None

Provide a brief explanation of your rating:

Blue oak woodland, vernal pools, and grasslands are critical habitats that support a wide range of at risk species. These habitats are fast disappearing in the Central Valley.

This 4,000+ acre acquisition is a high priority because of its location (i.e., upper Cosumnes River watershed, foothill region, rapidly developing urban/suburban zone), it is time sensitive (i.e., option expires December 10, 2002), and the land is at risk of imminent development (i.e., existing proposal for a senior citizen center). There are no prime farmlands on the property. The affected landowners are willing sellers. Protection of this land would likely provide downstream watershed benefits including instream water quality and ecosystem health benefits, as well as provide an opportunity to broaden understanding of biological and ecological value associated with these habitat types through surveys and monitoring.

Research and Restoration Technical Panel Review:

CALFED Bay-Delta 2002 ERP PSP Research and Restoration Technical Panel Review Form

Proposal Number: 126

Applicant Organization: Sacramento Valley Open Space Conservancy

Proposal Title: East Sacramento County Blue Oak Legacy Acquisition Area-Deer Creek Hills Project

Review:

Please provide an overall evaluation summary rating:

Superior: outstanding in all respects;

Above Average: Quality proposal, medium or high regional value, and no significant administrative concerns;

Adequate: No serious deficiencies, no significant regional impediments, and no significant administrative concerns;

Not Recommended: Serious deficiencies, significant regional impediments or significant administrative concerns.

Overall Evaluation Summary Rating	Provide a brief explanation of your summary rating
XSuperior	This proposed acquisition is of very high regional value because of its strategic location as well as intrinsic biological and environmental value. This type of habitat is being rapidly eliminated by development and these endemic oak woodlands are important reservoirs of both floristic and faunal diversity unique to California. The cost sharing aspect of the proposal indicates a broad base of support for this project as well as being financially efficient for CALFED. The track record for the applicant suggests that this cost sharing approach will be successful. Given the conservation value of this critical parcel, the applicant is strongly encouraged to develop a monitoring program in order to help manage and conserve the biodiversity of the site after acquisition.
-Above average	
-Adequate	
-Not recommended	

1. **Goals and Justification.** Does the proposal present a clear statement of goals, objectives and hypotheses? Does the proposal present a clear justification and conceptual model for the project?

This proposal seeks funding towards fee title land acquisition of approximately 4000 acres of blue oak woodland that is very strategically located. There was general agreement that this parcel had high intrinsic biological value as well as high value in providing connectivity to surrounding preserved lands. This is a very timely acquisition of an important parcel that will contribute significantly to the conservation of this increasingly threatened habitat.

2. **Likelihood of Success (Approach, Feasibility, Capabilities and Performance Measures).** Is the project likely to succeed based on the approach, feasibility and project team capabilities? Are the proposed performance measures adequate for measuring the project's success?

The cost sharing aspect of this proposal as well as the demonstrated capability of the applicant for developing partnerships in land acquisition is a very strong aspect here. Although there was some concern that all the partners have not committed to funding the acquisition, the good track record of the applicant in these types of land deals would suggest a high probability that the acquisition will be successful.

3. **Outcomes and Products.** Will the project advance the state of scientific knowledge in general and/or make an important contribution to the state of knowledge of the Bay-Delta Watershed? For restoration proposals, is the project likely to contribute to ecosystem restoration or species recoveries in a significant way? Will the project produce products useful to decision-makers and scientists?

The primary product of this project, if successful, would be the acquisition of the parcel. The direct contribution to our knowledge base on this habitat would be heightened if, after acquisition, a monitoring program was initiated and a more complete biological inventory of the parcel was completed.

4. **Cost/Benefit Comments.** Is the budget reasonable and adequate for the work proposed?

The proposed cost sharing is a very strong aspect of the project, and the success of obtaining funds from all the partners for the actual acquisition is likely given the prior experience of the applicants.

5. **Regional Review.** How did the regional panel(s) rank the proposal (High, Medium, Low)? Did the regional panel(s) identify significant benefits (regional priorities, linkages with other activities, local involvement) or impediments (local constraints, conflicts with other activities, lack of local involvement) to this proposal? What were they?

The Sacramento regional panel ranked the proposal Medium. Several panel members felt this project was extremely important for the region. The panel was unanimous in its feeling that the cost sharing approach indicated that this project is well linked with local people and institutions. Further, the panel felt the project would implement conservation strategies being pursued by Sacramento County and private landowners. The panel also noted that the project is well linked to other conservation planning efforts being conducted in the region by The Nature Conservancy and The American River Conservancy, as well as to efforts to protect this declining habitat by local organizations, as well as State and Federal agencies. There was a little concern about the feasibility of the project because not all the proposed partners had committed to funding the project and that current zoning issues may need to be addressed.

6. **Administrative Review.** Were there significant concerns about the proposal with regard to the prior performance, environmental compliance and budget administrative reviews? What were they?

Financial management and record keeping were judged to be excellent on past projects. The administrative panel noted that the Conservancy has been successful in acquiring other partnering funds (besides CVPIA) to complete their acquisitions. It was noted that the identified potential funding sources for the proposed acquisition would cover less than 50% of the projected cost and may affect the applicants ability to complete acquisition within time frame of referenced option to purchase. The panel reported that a recent update (2/8/02) from the applicant indicates that they have renegotiated their purchase agreement to acquire half the property (2000 acres) by Sept. 30, 2002 and that they must exercise their option to purchase by June 15, 2002. There were no significant concerns on environmental compliance issues.

Miscellaneous comments:

None

Land Acquisition:

Proposal Number: 126

Applicant Organization: Sacramento Valley Open Space Conservancy

Proposal Title: East Sacramento County Blue Oak Legacy Acquisition Area-Deer Creek Hills Project

1. Is the site's ecological importance documented in the proposal?

Yes -No

If yes, please import relevant text and citations here:

The properties under consideration include almost all the land within Sacramento County's East County Open Space Study Area, bounded by Highway 50/City of Folsom on the north, the Sacramento County urban services boundary on the west, the Cosumnes River on the south, and the Sacramento-El Dorado County line on the east. The project lies in the middle Cosumnes River watershed, between Deer Creek and the Cosumnes River, and contains Crevis Creek, other seasonal creeks and drainages, and some vernal pools. The project area links efforts by The Nature Conservancy to protect the lower Cosumnes watershed in Sacramento and San Joaquin Counties, and efforts by the American River Conservancy to protect the upper Cosumnes watershed in El Dorado County. Properties range from 150 to 550 feet in elevation, with few exceptions, and are currently managed as cattle ranches....Criteria for priority ranking of Tier A priority properties (apply to all, unless noted): High density of blue oaks Near/surrounding tributaries to the Cosumnes River Wetlands/floodplain areas

The habitat types in this area include northern hardpan vernal pools and related grasslands, blue oak series, and riparian areas. The special status plant species associated with northern hardpan vernal pools include Legenere, and Sacramento and Slender Orcutt grasses. These plants have been indicated as species likely to be present by US Fish & Wildlife and US Department of Agriculture staff on an October 2000 site visit to the Renown property and in a 1998 EIR on part of the 4062 acre property. Vernal pools of this region support many species of endemic invertebrates, including fairy and tadpole shrimp. Vernal pool grasslands also host rare amphibians such as the California tiger salamander and the Western spadefoot toad. Pools also serve as important staging grounds for migratory waterfowl, offering abundant water and protein-rich feeding grounds. This region also provides important winter forage for numerous hawks, including ferruginous, rough-legged, Swainsons (summer visitor), red-tailed hawks and northern harriers. All these species are likely to occur in the area. Hawks and other raptors have been sighted foraging.

Blue oak woodlands form a ring around the edge of the Great Central Valley, and epitomize the natural landscape of California. Animal diversity is higher in foothill woodlands than in either adjoining grasslands or conifer forests; 278 vertebrate species of wildlife rely upon oak woodlands for cover, food, nesting, or resting. Acorns provide a particularly rich food source, supporting wildlife from mule deer to field mice to insects. Blue oaks (*Quercus douglasii*) are unique to California, and occur on dry, foothill slopes. The blue oak is uniquely adapted to the heat and drought of this environment; it is the only tree species that extends into the lowest, sunniest slopes and plains. Its occurrence creates conditions which support a variety of grasses and understory shrubs including manzanita, redbud,

coffeeberry, poison oak, and lavender. Due to this structural diversity, blue oak woodland provides critical cover, shade, food and other resources for animals such as black-tailed deer, gray fox, and acorn woodpeckers as they move up and down the foothills. California is losing its blue oak woodlands. This loss is particularly serious in the Sierra foothills, where forests are being cleared for ranching, housing developments, and vineyards. As these types of land conversion continue, woodland becomes more and more fragmented, leading to a decline in habitat quality and the species which depend upon the woodlands and their resources.

The grasslands adjacent to the blue oak woodland areas and the riparian areas may also support the burrowing owl, according to US Fish & Wildlife and US Department of Agriculture staff on an October 2000 site visit to the Renown property and in a 1998 EIR on part of the 4000 acre property.

The riparian areas are intermittent creeks (Alder, Coyote, Carson, Deer and Crevis Creeks). In the Deer Creek area, Western pond turtle, VELB (blue elderberries) and Boggs Lake Hedge Hessop have also been indicated as species likely to be present by US Fish & Wildlife and US Department of Agriculture staff on an October 2000 site visit to the Renown property, and the other plants listed in the Summary section of this proposal were listed in a 1998 EIR on part of the 4062 acre property. Land preservation along Deer and Crevis Creeks in the Tier A priority area would provide protection of upper tributaries in the Cosumnes River Watershed.

SVOSC hopes to establish a core protection area around Deer Creek and Crevis Creek by pursuing preservation of the Renown, the Scott Ranch, and 4062 acre property and other adjacent properties, that will provide a base to help protect more properties in this area. The proposed acquisition area is a complement to preservation efforts of blue oak woodlands to the south in Sacramento County by The Nature Conservancy (see TNC support letter), and to the efforts of the American River Conservancy to preserve lands along upper Deer Creek and the upper Cosumnes River watershed in Eldorado County. TNCs Cosumnes Project aims to protect the lower and middle Cosumnes River watershed. Protection of the areas around Deer Creek can assist with long-term health of the downstream ecosystem and the lower Cosumnes watershed.

2. Is the owner's willingness to sell the site documented in the proposal?

Yes -No

If no, please explain:

3. Is evidence of local government support for the purchase included in the proposal?

Yes -No

If yes, please explain:

According to the applicant, a letter of support for the acquisition from th Sacramento County Planning Department is "available"

4. Is the use proposed for the site after its purchase clearly consistent with the site's general plan designation and zoning?

Yes -No

If no, please explain:

The site is zoned for Agriculture-80 (presumably 1 unit/80 acres) and designated in the county general plan with agriculture-recreation reserve with a resource conservation area overlay. In addition, according to the applicant, Sacramento County has identified Deer Creek as a priority natural area in its general plan. The area is outside the urban services boundary of Sacramento County.

5. Is the land mapped as prime farmland, farmland of statewide significance, unique farmland, or farmland of local importance?

-Yes No

If yes, please explain the classification:

Is the site under a Williamson Act contract?

-Yes No

Will use of the site change from agriculture after its purchase?

Yes -No -Not Currently in Agriculture

6. Is this a time-sensitive acquisition opportunity, according to the proposal?

Yes -No

If yes, please import relevant text here:

Developers and land speculators have purchased and/or optioned many parcels in this area in anticipation of future residential and commercial development fueled by the proposed expansion of the City of Folsom south of Highway 50 and Sacramento County's recent Measure O, which would have authorized a large senior community (Deer Creek Hills) on part of the 4062 acre property (just to the north of the Cosumnes River and the existing Rancho Murieta development).

Other Comments:

Impacts of the acquisition on local governments other than Sacramento County aren't clear. According to the application, the City of Folsom recently received approval from the Sacramento County Local Area Formation Commission to expand their Sphere of Influence south of U.S. Highway 50 (in the East County Study Area), which would result in eventual development of a significant area of oak woodlands and grasslands to the north of the project area.

Sacramento Regional Review:

Proposal Number: 126

Applicant Organization: Sacramento Valley Open Space Conservancy

Proposal Title: East Sacramento County Blue Oak Legacy Acquisition Area-Deer Creek Hills Project

Overall Ranking: -Low Medium -High

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

Although several panel members felt this project was extremely important for the region, the appropriateness of using CALFED funds to support land acquisition was questioned. Several panel members were concerned that the project was politically controversial.

1. Is the project feasible based on local constraints?

-Yes No

How?

Our No is qualified. The panel felt the feasibility of acquiring the total proposed land area may be low because it depends on developing many new cost share partners who have not yet made a commitment to this project.

2. Does the project pursue the restoration priorities applicable to the region as outlined in the PSP?

Yes -No

How?

This project pursues the regional PSP priority 1, develop and implement habitat management and restoration actions in collaboration with local groups, and multi-region priority 6, ensure recovery of at-risk species.

3. Is the project adequately linked with other restoration activities in the region, such as ongoing implementation projects and regional planning efforts?

Yes -No

How?

The project would implement conservation strategies being pursued by Sacramento County and private landowners. The project is linked to other conservation planning efforts being conducted in the region by The Nature Conservancy and The American River Conservancy, as well efforts to protect this rare and declining habitat by local organizations and State, and Federal agencies.

4. Does the project adequately involve local people and institutions?

Yes -No

How?

The project is supported by local representatives, the California Rangeland Trust, the Sacramento Planning Department, and the public. Cost sharing with a number of local organizations also indicates this project is well linked with local people and institutions.

Other Comments:

The panel was concerned about current zoning and the controversy associated with this project.

External Scientific: #1

Research and Restoration External Scientific Review Form

Proposal Number: 126

Applicant Organization: Sacramento Valley Open Space Conservancy

Proposal Title: East Sacramento County Blue Oak Legacy Acquisition Area-Deer Creek Hills Project

Conflict of Interest Statements:

I have no financial interest in this proposal.

XCorrect

-Incorrect

In the blank below please explain any connection to proposal, to applicant, co-applicant or subcontractor or to submitting institution (write "none" if no connection):

none

Review:

Please provide an overall evaluation summary rating:

Excellent: outstanding in all respects;

Good: quality but some deficiencies;

Poor: serious deficiencies.

Overall Evaluation Summary Rating	Provide a brief explanation of your summary rating
XExcellent	The strategic location of the property and the imminent encroachment of development as a result of the expansion of the Folsom boundaries make this a timely and important project.
-Good	
-Poor	

1. **Goals.** Are the goals, objectives and hypotheses clearly stated and internally consistent? Is the concept timely and important?

The proposal is internally consistent. Since it is an acquisition proposal, the conceptual basis is simple: that connectivity and coordination with surrounding preserved lands are important.

Blue oak woodland is being converted at records speeds as sprawl advances into the foothills. It is widely acknowledged to be a habitat of major importance to a high diversity of plants and animals.

The timeliness of the project has been driven in large part by the expansion of the Solson Sphere of Influence south of Hwy 50. Unfortunately this acquisition did not anticipate the annexation and is forced to compete with speculators and developers thus raising prices.

The project acts as a link between areas protected by The Nature Conservancy in the lower Cosumnes watershed and areas in the upper Cosumnes where conservation efforts are being made by the American River Conservancy. It is supported by The Nature Conservancy, an organization that works hard to prioritize its acquisition targets.

2. **Justification.** Is the study justified relative to existing knowledge? Is a conceptual model clearly stated in the proposal and does it explain the underlying basis for the proposed work? Is the selection of research, pilot or demonstration project, or a full-scale implementation project justified?

The project is solely for acquisition.

3. **Approach.** Is the approach well designed and appropriate for meeting the objectives of the project? Are results likely to add to the base of knowledge? Is the project likely to generate novel information, methodology or approaches? Will the information ultimately be useful to decision-makers?

The project is solely for acquisition.

4. **Feasibility.** Is the approach fully documented and technically feasible? What is the likelihood of success? Is the scale of the project consistent with the objectives?

The applicants have identified willing sellers and a number of potential and willing cost share partners. They have an excellent track record of completing this type of acquisitions.

5. **Project-Specific Performance Measures.** Does the project include appropriate performance measures to measure success relative to the project's goals and objectives? Is there enough detail as to how the performance measures will be quantified? For restoration projects, are monitoring plans explicit and detailed enough to determine if performance measures will be adequately assessed?

The project is solely for acquisition.

The measure of performance should simply be the connectivity to other key preserved lands in the watershed - it certainly passes that test.

6. **Products.** Are products of value likely from the project? Specifically for restoration projects, are products of value also likely from the monitoring component? Are interpretative outcomes likely from the project?

The primary product will be the addition to the corridor along the Cosumnes of critical habitat. Although interpretive outcomes will not come directly from this project, it opens the door for studies of the effectiveness of preserving corridors.

7. **Capabilities.** What is the track record of applicants in terms of past projects? Is the project team qualified to efficiently and effectively implement the proposed project? Do they have available the infrastructure and other aspects of support necessary to accomplish the project?

The group has successfully preserved a number of properties over the past 8 years.

8. **Cost/Benefit Comments.** Is the budget reasonable and adequate for the work proposed?

The applicant is requesting a small portion of the total acquisition cost from the CalFed program. It will require the participation of a number of additional partners to be completed.

Miscellaneous comments:

Price per acre seems fairly reasonable, particularly in light of recent speculation in the area.

External Scientific: #2

Research and Restoration External Scientific Review Form

Proposal Number: 126

Applicant Organization: Sacramento Valley Open Space Conservancy

Proposal Title: East Sacramento County Blue Oak Legacy Acquisition Area-Deer Creek Hills Project

Conflict of Interest Statements:

I have no financial interest in this proposal.

XCorrect

-Incorrect

In the blank below please explain any connection to proposal, to applicant, co-applicant or subcontractor or to submitting institution (write "none" if no connection):

none

Review:

Please provide an overall evaluation summary rating:

Excellent: outstanding in all respects;

Good: quality but some deficiencies;

Poor: serious deficiencies.

Overall Evaluation Summary Rating	Provide a brief explanation of your summary rating
XExcellent	I rate this as "good-plus to excellent" Monitoring is not included, but project through purchase would link foothill and valley reserves and include habitat types that are under intense developmental pressure.
-Good	
-Poor	

1. **Goals.** Are the goals, objectives and hypotheses clearly stated and internally consistent? Is the concept timely and important?

Yes. Yes. Property is an important link between existing reserves.

2. **Justification.** Is the study justified relative to existing knowledge? Is a conceptual model clearly stated in the proposal and does it explain the underlying basis for the proposed work? Is the selection of research, pilot or demonstration project, or a full-scale implementation project justified?

Yes. Yes. Implementation: yes.

3. **Approach.** Is the approach well designed and appropriate for meeting the objectives of the project? Are results likely to add to the base of knowledge? Is the project likely to generate novel information, methodology or approaches? Will the information ultimately be useful to decision-makers?

Yes. Unclear. Unclear. Yes.

4. **Feasibility.** Is the approach fully documented and technically feasible? What is the likelihood of success? Is the scale of the project consistent with the objectives?

Yes. P>95%. Yes.

5. **Project-Specific Performance Measures.** Does the project include appropriate performance measures to measure success relative to the project's goals and objectives? Is there enough detail as to how the performance measures will be quantified? For restoration projects, are monitoring plans explicit and detailed enough to determine if performance measures will be adequately assessed?

Purchase only: no built-in monitoring.

6. **Products.** Are products of value likely from the project? Specifically for restoration projects, are products of value also likely from the monitoring component? Are interpretative outcomes likely from the project?

Yes. Not from monitoring. Possible interpretive value in linking foothill, valley floor, and riparian reserves.

7. **Capabilities.** What is the track record of applicants in terms of past projects? Is the project team qualified to efficiently and effectively implement the proposed project? Do they have available the infrastructure and other aspects of support necessary to accomplish the project?

Good. Good. Looks like very good support.

8. **Cost/Benefit Comments.** Is the budget reasonable and adequate for the work proposed?

Yes.

Miscellaneous comments:

External Scientific: #3

Research and Restoration External Scientific Review Form

Proposal Number: 126

Applicant Organization: Sacramento Valley Open Space Conservancy

Proposal Title: East Sacramento County Blue Oak Legacy Acquisition Area-Deer Creek Hills Project

Conflict of Interest Statements:

I have no financial interest in this proposal.

XCorrect

-Incorrect

In the blank below please explain any connection to proposal, to applicant, co-applicant or subcontractor or to submitting institution (write "none" if no connection):

none

Review:

Please provide an overall evaluation summary rating:

Excellent: outstanding in all respects;

Good: quality but some deficiencies;

Poor: serious deficiencies.

Overall Evaluation Summary Rating	Provide a brief explanation of your summary rating
XExcellent	I would say this proposal represents an EXCELLENT OPPORTUNITY and a GOOD PROPOSAL. The instiution's (SVOSC) ability to develop a more comprehensive baseline assesment of the conservation values and effectively plan for future stewardship is most likely limited by lack of resources. However, this should not dimish the importance of the project.
-Good	
-Poor	

1. **Goals.** Are the goals, objectives and hypotheses clearly stated and internally consistent? Is the concept timely and important?

The goal to acquire land is clear. It is a timely project because the local organization proposing the purchase has an option to buy that will expire at the end of the year.

2. **Justification.** Is the study justified relative to existing knowledge? Is a conceptual model clearly stated in the proposal and does it explain the underlying basis for the proposed work? Is the selection of research, pilot or demonstration project, or a full-scale implementation project justified?

The purchase is well justified based on landscape variables such as size, location, adjacency, importance of the watershed, and risk of development. A map of the habitat types and the level of biological integrity and condition of the site, including the status of oak regeneration, was not provided and would have been useful. However, expert opinion is provided on the habitat suitability for certain species.

3. **Approach.** Is the approach well designed and appropriate for meeting the objectives of the project? Are results likely to add to the base of knowledge? Is the project likely to generate novel information, methodology or approaches? Will the information ultimately be useful to decision-makers?

The approach includes fee title purchase and eventual donation to the County and what seems like a strong possibility of resale to a private individual with a conservation easement. Assurances of habitat protection are given but the mechanism for land management by the County is not clearly described. Given the cost of managing land of this size it would be prudent to investigate this further. Also, the area slated for resale with an easement was not delineated on the project maps or well described.

4. **Feasibility.** Is the approach fully documented and technically feasible? What is the likelihood of success? Is the scale of the project consistent with the objectives?

It does seem that SVOSC will succeed in raising the money needed for this purchase. Protecting the land presents a valuable opportunity given its size and location. The risk for conversion to development is clear and this type of oak woodland is primarily in private ownership making these types of purchases essential for blue oak woodland protection.

5. **Project-Specific Performance Measures.** Does the project include appropriate performance measures to measure success relative to the project's goals and objectives? Is there enough detail as to how the performance measures will be quantified? For restoration projects, are monitoring plans explicit and detailed enough to determine if performance measures will be adequately assessed?

Performance measures are not well covered in this proposal. The assumption is that success is defined by the purchase. However, success should be defined by protecting the conservation values of the property in perpetuity. The first step toward monitoring success would be a better understanding of the existing resource (baseline document), a clear plan for proper stewardship, and long term monitoring. However, this is a lot to ask from a local non-profit relatively new organization that is trying to raise the initial purchase price.

6. **Products.** Are products of value likely from the project? Specifically for restoration projects, are products of value also likely from the monitoring component? Are interpretative outcomes likely from the project?

There is a clear product -- securing 4,062 acres of woodland -- a most worthy goal. Protecting upland watersheds is essential for the health of streams and bay lands.

7. **Capabilities.** What is the track record of applicants in terms of past projects? Is the project team qualified to efficiently and effectively implement the proposed project? Do they have available the infrastructure and other aspects of support necessary to accomplish the project?

It is difficult for me to assess the capabilities of SVOSC. Land trusts are extremely variable and their success is usually related to size, age, mission, and capital. This project would definitely represent the largest site in SVOSC's portfolio, even after most of the land is turned over to the

county (leaving a 500 acre easement with SVOSC). Properly developing a baseline resource inventory, monitoring, and stewarding this land will add a substantial burden to the SVOSC.

8. **Cost/Benefit Comments.** Is the budget reasonable and adequate for the work proposed?

The requested amount is less than 10% of the purchase price so Cal Fed would be taking advantage of a significant cost share if the property is ultimately secured. This makes the project seem like good value.

Miscellaneous comments:

One of the greatest strengths of this proposal is the institutional partners in support of the proposal. There is clearly a great deal of support and consensus among local, regional, and state organizations that this purchase is a top priority.

External Scientific: #4

Research and Restoration External Scientific Review Form

Proposal Number: 126

Applicant Organization: Sacramento Valley Open Space Conservancy

Proposal Title: East Sacramento County Blue Oak Legacy Acquisition Area-Deer Creek Hills Project

Conflict of Interest Statements:

I have no financial interest in this proposal.

Correct

Incorrect

In the blank below please explain any connection to proposal, to applicant, co-applicant or subcontractor or to submitting institution (write "none" if no connection):

None

Review:

Please provide an overall evaluation summary rating:

Excellent: outstanding in all respects;

Good: quality but some deficiencies;

Poor: serious deficiencies.

Overall Evaluation Summary Rating	Provide a brief explanation of your summary rating
<input checked="" type="checkbox"/> Excellent	This proposed acquisition is very timely and strategically located. The cost sharing aspects of the acquisition make this an especially effective use of CALFED funds.
<input type="checkbox"/> -Good	
<input type="checkbox"/> -Poor	

1. **Goals.** Are the goals, objectives and hypotheses clearly stated and internally consistent? Is the concept timely and important?

1 - Excellent The overall goals of this proposal are simple and are directed toward the acquisition of a parcel of oak woodland that is very important for its location as a linking parcel. It is timely given that the organization has an option to buy that will expire this year.

2. **Justification.** Is the study justified relative to existing knowledge? Is a conceptual model clearly stated in the proposal and does it explain the underlying basis for the proposed work? Is the selection of research, pilot or demonstration project, or a full-scale implementation project justified?

1 - Excellent A 1998 EIR on part of the parcel along with expert opinion supports the ecological value of this parcel. Its location is within an area that is rapidly becoming developed and it is very strategically located.

3. **Approach.** Is the approach well designed and appropriate for meeting the objectives of the project? Are results likely to add to the base of knowledge? Is the project likely to generate novel information, methodology or approaches? Will the information ultimately be useful to decision-makers?

2 - Very Good Given that this is essentially a land acquisition proposal, there is not likelihood that the project itself will generate new knowledge. The approach by the applicants to develop a broad consortium of potential donors is a real plus because it allows CALFED to take advantage of significant cost sharing (although there is also a certain amount of risk involved with this approach).

4. **Feasibility.** Is the approach fully documented and technically feasible? What is the likelihood of success? Is the scale of the project consistent with the objectives?

2 - Very Good A key factor here is whether the applicants are successful in garnering funds from the various potential donors. The outlook is promising because of the apparent broad-based support for this acquisition.

5. **Project-Specific Performance Measures.** Does the project include appropriate performance measures to measure success relative to the project's goals and objectives? Is there enough detail as to how the performance measures will be quantified? For restoration projects, are monitoring plans explicit and detailed enough to determine if performance measures will be adequately assessed?

2 - Very Good The primary performance measure here is the successful acquisition of the parcel. No significant monitoring program is described.

6. **Products.** Are products of value likely from the project? Specifically for restoration projects, are products of value also likely from the monitoring component? Are interpretative outcomes likely from the project?

2 - Very Good Product would be successful acquisition of the parcel.

7. **Capabilities.** What is the track record of applicants in terms of past projects? Is the project team qualified to efficiently and effectively implement the proposed project? Do they have available the infrastructure and other aspects of support necessary to accomplish the project?

2 - Very Good

The applicants have a good track record in acquiring oak woodland and developing collaborative efforts in parcel acquisition.

8. **Cost/Benefit Comments.** Is the budget reasonable and adequate for the work proposed?

2 - Very Good The cost sharing is a big benefit here.

Miscellaneous comments:

Prior Performance/Next Phase Funding:

New Proposal Number: 126

New Proposal Title: East Sacramento County Blue Oak Legacy Acquisition Area-Deer Creek Hills Project

1. Prior CALFED project numbers, titles, and programs: *(list only projects for which you are the contract manager)*
2. Prior CVPIA project numbers, titles, and programs: *(list only projects for which you are the contract manager)*

114209G122, Sacramento Valley Open Space Conservancy Vernal Pool Preserve, CVPIA (b)(1) other

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

Yes -No -N/A

If no, please explain any difficulties:

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

Yes -No -N/A

If no, please explain any inaccuracies:

5. Is the applicant's progress towards these project(s)' milestones and outcomes to date satisfactory?

Yes -No -N/A

If no, please explain deficiencies:

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

-Yes No -N/A

If no, please explain deficiencies:

Financial management and record keeping are satisfactory on past projects. Reporting (in previous projects development of grazing plans) could have been more timely.

Identified potential funding sources for the proposed acquisition would cover less than 50% of the projected cost which may limit applicants ability to complete acquisition within time frame of referenced option to purchase

7. Will the project(s) be ready for next phase funding in 2002, based on its current progress and expenditure rates?

-Yes -No N/A

If no, please explain:

Other Comments:

The biggest recurring problem faced by the Conservancy from the Services perspective is their hindered ability to successfully negotiate agreements with landowners in a timely manner. Lack of successful closure of acquisitions is not a reflection on the Conservancy of a lack of effort on their part, but a sign of the difficulty in negotiating contracts. We feel the need to be cautious in obligating funds towards acquisition without a strong indication that willing sellers are in the proposal area.

Recent update (2/8/02) from the applicant indicates that they have renegotiated their purchase agreement to acquire half the property (2000 acres) by Sept. 30, 2002. They must exercise their option to purchase by June 15, 2002.

Conservancy has been successful in acquiring other partnering funds (besides CVPIA) to complete their acquisitions.

Environmental Compliance:

Proposal Number: 126

Applicant Organization: Sacramento Valley Open Space Conservancy

Proposal Title: East Sacramento County Blue Oak Legacy Acquisition Area-Deer Creek Hills Project

1. Are the legal or regulatory issues that affect the proposal identified adequately in the proposal?

Yes -No

If no, please explain:

2. Does the project's timeline and budget reflect adequate planning to address legal and regulatory issues that affect the proposal?

Yes -No

If no, please explain:

3. Do the legal and regulatory issues that affect the proposal significantly impair the project's feasibility?

-Yes No

If yes, please explain:

Other Comments:

Budget:

Proposal Number: 126

Applicant Organization: Sacramento Valley Open Space Conservancy

Proposal Title: East Sacramento County Blue Oak Legacy Acquisition Area-Deer Creek Hills Project

1. Does the proposal include a detailed budget for each year of requested support?

Yes -No

If no, please explain:

2. Does the proposal include a detailed budget for each task identified?

Yes -No

If no, please explain:

3. Does the proposal clearly state the type of expenses encompassed in indirect rates or overhead costs?

Yes -No

If no, please explain:

4. Are appropriate project management costs clearly identified?

Yes -No

If no, please explain:

5. Do the total funds requested (Form I, Question 17A) equal the combined total annual costs in the budget summary?

-Yes No

If no, please explain (for example, are costs to be reimbursed by cost share funds included in the budget summary).

Cost share funds must be included in the budget summary

6. Does the budget justification adequately explain major expenses?

Yes -No

If no, please explain:

7. Are there other budget issues that warrant consideration?

-Yes No

If yes, please explain:

Other Comments: