



# REGIONAL CONSERVATION INVESTMENT STRATEGIES STRATEGIC MEETING SUMMARY

## ABSTRACT

A summary of the meeting held on October 2, 2018 to discuss best practices and foster a learning network for stakeholders involved in Regional Conservation Investment Strategies

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# Regional Conservation Investment Strategies

## Strategic Meeting Summary

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## I. Purpose and Background

**On October 2, 2018,** over seventy people involved in Regional Conservation Investment Strategy (RCIS) filled a gallery in Sacramento, California. Individuals represented many disciplines including regulators, federal, state and local governments, scientists, conservation organizations, public utilities, consultants, mitigation bankers, and developers. The focus of the day was to build relationships, share experiences, discuss lessons learned to date, and identify best practices to design a successful RCIS.



This Strategic Meeting Summary captures the discussion from the day, key take away messages for each of the agenda topics, suggested next steps, as well as relevant reference documents for future RCIS practitioners or sponsors. This Summary will be distributed to workshop participants, invitees who could not attend, and others engaged in RCIS and mitigation as part of conservation planning.

The Meeting participants were motivated to make the RCIS program succeed as an important conservation tool in California. Ken Alex, Director of the California Office of Research and Planning and Strategic Growth Council Chair, stated during the meeting, “We need to know more about conservation values and specifics throughout the State. RCISs are a way to make the planning process more robust and integrated.”

Background pre-read material provided by the California Department of Fish and Wildlife (CDFW), outlines the Program and the over 40,000 species and 40 million people that depend on the land, water, climate and soil in California<sup>1</sup>. These habitats are subject to increasing stressors from invasive species to development to climate change, and the need to be adequately conserved.

The RCIS Program regulatory overview is summarized below:

- In 2016, California law AB 2087 (Levine)<sup>2</sup> authorized public agencies to create planning tools that promote the voluntary conservation of species, habitats, and other natural

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<sup>1</sup> Appendix document 1 (CA DFW- RCIS program: California new conservation and mitigation program)

<sup>2</sup> [https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill\\_id=201520160AB2087](https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=201520160AB2087)

resources and enables advance mitigation for public infrastructure projects and other large-scale projects at the state or local level.

- RCISs build on the guidance of existing programs and previous conservation investments such as the State Wildlife Action Plans (CDFW 2015) to address the pressures and stressors facing species of greatest conservation need.
- RCISs can support compensatory mitigation needs for a range of state and federal laws, including the California Endangered Species Act (CESA), federal Endangered Species Act (ESA), the California Environmental Quality Act (CEQA), National Environmental Policy Act (NEPA) and state Lake or Streambed Alteration (LSA) Program, among others.
- In September 2018, CDFW published its most recent RCIS Program Guidelines<sup>3</sup> to assist state and local agencies, private entities and the public in implementing the RCIS Program.

This Meeting summary is organized based on the agenda and flow of the meeting. Key documents, including the agenda for the day, objectives for the meeting, a complete copy of all presentations, and group table top discussion feedback are included in the Appendix. The Resources section at the end of this document provides links to RCIS Program resources, including the framework, example RCIS documents, program overviews, conservation and mitigation references.

## II. RCIS vision and mission

The California Regional Conservation Investment Strategy (RCIS) Program<sup>4</sup> is a non-regulatory, voluntary approach to assess the conditions of conservation lands in a given region and support mitigation actions to further long-term conservation. The RCIS Program includes three distinct, but related components:

- Preparation of an optional Regional Conservation Assessment (RCA)
- Development of a specific Regional Conservation Investment Strategy (RCIS) plan
- Completion of Mitigation Credit Agreement (MCA)

These components are intended to spur conservation planning across the state and achieve high-quality advance mitigation outcomes by guiding investments to support regional conservation priorities.

The agenda and objectives for this meeting were established by a Steering Committee of members from government, private and public sectors. The members of this Steering Committee are listed at the end of this summary.

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<sup>3</sup> California Department of Fish and Wildlife RCIS Program Website:  
<https://www.wildlife.ca.gov/conservation/planning/regional-conservation>

<sup>4</sup> California Department of Fish and Wildlife's RCIS Program website:  
<https://www.wildlife.ca.gov/Conservation/Planning/Regional-Conservation>

To help facilitate a shared understanding of the RCIS Program, the Steering Committee developed a draft **RCIS Program Vision, Mission and Goal statement**. Those statements are listed below, along with a brief summary of the discussion generated during the meeting:

**VISION:** The RCIS Program is valued as a tool for the conservation, infrastructure and mitigation sectors to identify and invest in conservation priorities and advance mitigation strategies that provide efficiencies for mitigation and conservation actions. The result is a California with conserved, connected, and climate-resilient landscapes that benefit all plants and wildlife dependent on California's natural communities and provide nature's services and benefits to people.

**MISSION:** CDFW administers a new regional conservation and advance mitigation tool to guide investments in the conservation of natural resources, including biodiversity and ecological processes, to enhance resiliency to climate change and other threats, and to enable California entities to implement infrastructure and other projects efficiently with positive environmental outcomes.

**GOAL:** Increase awareness and use of CDFW's RCIS Program for comprehensive regional conservation investments and mitigation solutions in California, especially where other conservation tools may be limited or unavailable.

Participants in the Meeting were generally in agreement and gave a "thumbs-up" to the **Vision** and **Mission** statements. Suggestions and questions included:

- A commenter from the Habitat Conservation Planning Coalition expressed *concern that people will expect more than the RCIS Program can deliver.*
- A regulator described that *because an RCIS is not a commitment, funding (such as bonds, and grants) could increase the likelihood that RCIS goals are achieved.*
- One commenter asked *about incentivizing private entities.*
- A regulator asked about *ways an RCIS can encourage forward thinking: How can we get there sooner? How can we help infrastructure projects and local projects, especially in places where banking is not as attractive?*

The **Goal** statement generated the most discussion, with the group of mixed opinion on how specific a **Goal** statement needed to be. Specifically, that the statement as presented lacked specific quantifiable measures to be effective. Specific comments included:

- *Is the goal to increase awareness?*
- *Can there be targets in specific areas?*
- *Can there be a measurable goal?*



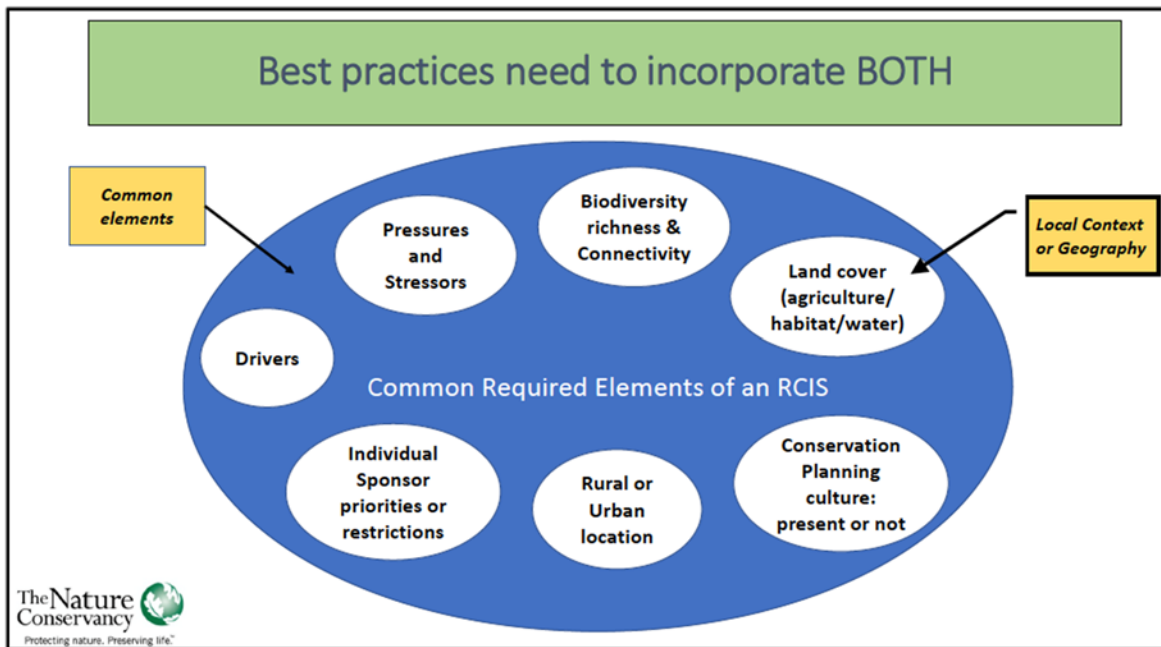
- *Do we want to target having a set number of acres around the state covered by an RCIS by a specific date?*
- *Is the Goal for the RCIS Program, a summary of CDFW's goal for the Program or should the Program goals differ depending on the audience?*

Given the number of questions and comments and lack of consensus or general agreement, refining the Goal statement was set aside for potential future work.

### III. Scope of RCIS requirements and best practice considerations

A key objective of the meeting was to solicit feedback, collaborate and identify best practices for successful RCISs. To be successful, an RCIS document needs to address both common elements stated in the CDFW guidelines, as well as local context, that will be specific to local geography, politics and other considerations. Discussions were broken out into two major areas (Common elements and Local context), with the goal of identifying the most impactful approaches or solutions to create RCISs efficiently, effectively and comprehensively. The groups were based on pre-assigned tables of individuals representing different fields. The morning discussion focused on Common elements, with the afternoon discussion focused on Local context. A complete list of all comments for both Common requirements and Local context are tabulated in the Appendix.

- Common elements for RCISs – topics that are common to all RCISs, either as required in the law or guidelines, or in practice. There were 7 topics discussed at the meeting, based on a Survey Monkey among all meeting invitees to determine topics which were of highest importance or impact for best practice development. Results from the Survey Monkey were presented at the meeting and included in the Appendix 2 document. These 7 topics are outlined in the section below.
- Local context and situational considerations – topics that are relevant to local needs and situations, that might require RCIS sponsors to be adaptive and flexible in the RCIS design and implementation. The topic areas to be considered in the Local context discussion were predetermined by the Steering Committee members. They are outlined in the following diagram, that captures the idea that each RCIS needs to contain the same common requirements, but need to integrate local context topics. This will require the author to be flexible in that these local context topics may and probably will differ based on the specific situation.



### A. Common elements

To identify the topics with the highest level of interest for discussion, TNC used a market research tool (Survey Monkey) in advance of the meeting to determine the most impactful topics to be developed as Best Practices for RCIS stakeholders and practitioners. Forced ranking scores were used to provide guidance as to which topics would be most relevance to the participants. The top seven ranked topics were: multi-agency engagement, interplay between regulatory tools, mitigation credit agreements, RCIS design, conservation prioritization, funding and value creation. Lower ranked topics were not covered due to lack of time: resourcing, scope, conservation goals, region selection, metrics, HCP/NCCP overlap, mapping, transparency and outreach.

Participants were assigned to small groups to discuss a topic, capture each idea on post-it notes, and report back to the full group about the small groups top three ranked best practice ideas for their topic. This section summarizes the full group discussion of the key messages of the top ideas for each of the seven highest ranked topics and a word cloud of the most prominent ideas from the group discussion. The individual post it note ideas and feedback comments for each topic table are captured in the Appendix.



## 1. Multi-agency engagement

- Mitigation requirements: State and federal agencies must coordinate to ensure that mitigation opportunities identified in the RCIS can be used for both sets of regulatory requirements.
- Dedicated resource: How do you get a dedicated liaison at each of the agencies (unclear who funds this) to do an early review of RCIS plans and MCA so you have early buy-in?
- Overlapping requirements: Agencies have overlapping mitigation requirements. Agencies involved need to think about how their mitigation requirements are used. How can we mesh the diverse regulatory requirements and programs from different agencies, so that we aren't reinventing the wheel?
- Data access: Providing a data portal for RCISs and MCAs that all agencies can access will minimize duplicity in work across multiple agencies.



## 2. Interplay between regulatory tools

- Early Engagement: Ensure early, frequent, and regular engagement with regulatory and planning agencies. The RCIS should be a tool to efficiently address regulatory requirements of multiple agencies.
- Local context: Incorporating local land use planning and policy tools (e.g., local plan enabling language for transferable items). RCIS and local plans should inform each other.
- Value add: Create value from an RCIS by considering other available programs. Target use of in-lieu fees in areas that have them. Engage CEQA mitigation as a regulatory hook for credits of non-regulatory species. An RCIS can provide credit for species protected by a mitigation bank's credit program that aren't otherwise counted through a re-evaluation process, potentially adding value for banks.

## 3. Mitigation Credit Agreements

- Flexibility and scalability: How do we design MCAs to serve multiple users? Some entities will just want state coverage; some need multiple permits (e.g., federal and state). Need to recognize importance from high levels and for specific buyers.

"Need clarity on MCAs and straightforward, coordinated program with clear pathways for tracking and transferring credits."



- Complementary with existing programs: Consider other programs (e.g., RAMP, NCCP, HCP, in-lieu fee)<sup>5</sup> to maximize regulatory benefits of potential future credits for all agencies. The MCA process needs to be coordinated with what we already have, not a new separate process. We need to understand the demand and what kind of credits are needed.
- Durability and certainty: Credits are more valuable if they can cover more sites over time. Set up a way for RCISs to be updated over time to be used by mitigation credit banks.

#### 4. RCIS design

- Design process: The process of developing an RCIS should inform the design. Start with inventory, then create design alternatives. Expand from primarily a species centric focus to include broader ecosystems and habitats, such as water and wetlands.
- Planning: Use values and techniques for synthesizing and distilling information in planning context. Start with a broad scope and then prioritize based on preparer's needs. An interactive map and users guide would be valuable tools.

#### 5. Conservation prioritization

- Science based approach: Figure out what your plan is designed to accomplish. These are biodiversity-based plans, but they are also about working lands, so bake those needs into the planning process. Prioritize actions that take into account local conditions.
- Balance tradeoffs: Between a standards/criteria-based approach versus a spatially explicit/mapped approach. You want spatially explicit priorities with stacked values, even if quantitative objectives are a hard part of the process.



Photo by Jenn Fox

#### 6. Funding

- Need realistic funding for all stages: of planning, writing and implementing an RCIS. Include an agency-maintained list of state and federal funding sources. The larger the scope of the RCIS, the more expensive it is. You need to keep focused on what an RCIS is and what it isn't in order to keep them fundable.
- Marketing: Generate interest by branding the RCIS Program as "better, faster, cheaper" conservation planning.
- Implementation funding: In terms of funding to implement: promote within a statewide framework. It is important to ensure programmatic MCAs are allowable, because so

<sup>5</sup> RAMP = Regional Advance Mitigation Program; NCCP = Natural Community Conservation Plan; HCP = Habitat Conservation Plan

*many individual landowners won't be able to do this level of conservation planning themselves. Sponsor public agencies or NGOs who can aggregate landowners to build programmatic MCAs.*

## 7. Value creation

- Strategic approach: *An RCIS should save time, money and process. Integration beyond CDFW is critical.*
- Co-benefits: *Include consideration of carbon and water benefits.*
- Value of conservation on agricultural lands: *Start with understanding environmental practices on working lands. Consider ways an RCIS can reward landowners for habitat conservation.*

*"What are ways to incentivize best practices on private and working lands?"*

## B. Local context

In the afternoon, small groups reformed to identify ways to incorporate local context – pressures and stressors, social and political conditions, biodiversity richness, urban vs. rural setting, drivers, current land usage/status – into RCIS development.

Participants were asked to reflect on the local context prior to initiating an RCIS:

- What are the enabling conditions (local, social and political) that lead you to an RCIS?
- Will an RCIS add value to other conservation plans (include biological factors, conservation or enhancement needs or gaps) in your region?
- Who are the stakeholders?
- What are the drivers for an RCIS?
- What is the market for an RCIS?
- What would the implementation look like?

Based on the afternoon report outs, these were the most critical Local context topics identified, as being most impactful for a success RCIS:

1. Planning: *Plans are locally driven and should include opportunities to engage with local entities and community members, beginning with local context-setting.*
2. Outreach: *Local outreach and feedback is imperative. It is required for success, to integrate co-benefits to improve the plan, and to recruit local knowledge related to stressors. Understand the local culture concerning conservation planning.*



3. Local factors: Consider the RCIS as a locally driven initiative. Strategic area maps can incorporate both ecological boundaries and political boundaries to ensure relevance and success. What are pressures/stressors due to land conversion, water use, policy drivers? Consider both the what/where and the how/who.
4. Science based: Species and resources need to be the drivers of conservation of resources. Biodiversity and species richness impacts the RCIS scope and species selection. Identify species impacted by local stressors (e.g. invasive species, pesticides).

A complete list of local context comments are included in the Appendix.

## IV. RCIS enabling conditions

### A. Why, when, and where would you do an RCIS

Andrea Mackenzie (Santa Clara Valley Open Space Authority) presented strategies for a successful RCIS. In her presentation, Andrea shared her experience and learnings as a RCIS sponsoring agency.

#### What is working today?

- Voluntary nature of the program
- Integrated design of the program
- New opportunities through use of voluntary actions, temporary credits and advance mitigation
- Broader scope of imperiled species conservation than currently covered with HCP/NCCP
- Engagement of public and local agencies in regional conservation planning
- Engagement of CDFW

#### What do we need to work on?

- Clarity around the program and what is required for approval
- Identify situations where an RCIS and MCA is preferred over existing mitigation strategies
- Help infrastructure agencies realize benefit and/or value from having RCIS in place
- Regulatory relief is unclear; can RCIS expedite mitigation approval process?
- Resources available so there is no impact to existing permitting programs

### B. Interaction between conservation planning tools

One issue that came up in the meeting was the relationship between RCIS and HCP/NCCPs. *It was important to meeting participants that the RCIS process complement and not conflict with the HCP or NCCP process.* For reference, here are the differences between the programs.

A Habitat Conservation Plan (HCP) is a required part of an application for an Incidental Take Permit to address impacts to listed species by individual projects under Section 10 of the

federal Endangered Species Act (ESA). The HCP program is administered by the U.S. Fish and Wildlife Service (USFWS). A Natural Community Conservation Program (NCCP) is a California state program to conserve and manage natural biological diversity within a designated area in conjunction with planned development, while taking into account management requirements for species covered under the California Endangered Species Act (CESA). The NCCP program is administered by CDFW. A joint HCP/NCCP, frequently called a Multi-Species Habitat Conservation Plan (MSHCP), is a plan that simultaneously addresses both sets of regulation and complies with both the federal and state Endangered Species Acts. An HCP/NCCP is approved by both USFWS and CDFW and is used to convey incidental take permits to individual projects and facilitate regional conservation, resulting in streamlined regulatory approvals. Most NCCPs include the HCP process in order to maximize the benefit of the plan by covering both state and federal listed species.

Developing an HCP/NCCP can take from ~5-20 years; and the costs can vary from ~\$1 to significantly more than \$5million for a large or complicated plan. This substantial variation depends on program complexity, availability of existing data, number of included species and natural communities, funding, agency staff availability and NEPA and CEQA environmental review time. While HCP/NCCPs take more time and resources to complete than individual project permitting actions, once the plan is approved, participating project proponents will benefit from streamlined approvals under the plan.

An RCIS is a conservation and mitigation planning tool that enables advance mitigation through an MCA which allows project proponents to satisfy future predicted mitigation needs, thereby ensuring project delivery efficiencies. An RCIS does not include incidental take, so project proponents must still apply for project-specific federal and/or state incidental take permits. However, an RCIS can be used by any project or project proponent to identify suitable mitigation opportunities, whereas an HCP/NCCP can only be used by those projects or entities that were identified either specifically or generically as covered activities. A project or proponent that was not a signatory to an HCP/NCCP at the time of its approval would need to apply for Participating Special Entity (PSE) status in order to participate in the plan. If that option is not available, an RCIS overlay could be used to identify additional species or mitigation opportunities for entities undergoing individual permitting efforts for which an existing HCP/NCCP is insufficient.

The chart below was prepared by CDFW to illustrate differences between three conservation programs managed by CDFW: RCIS, NCCP and Banking<sup>6</sup>.

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<sup>6</sup> Banking refers to the time and cost of setting up and receiving CDFW approval for a mitigation bank on a specific property.

	RCIS Program	NCCP Program	Banking Program
<b>Preparation cost (\$-\$-\$-\$-\$)</b>	RCIS: \$     MCA: \$\$	\$\$\$+	\$\$
<b>Prepare/Approve Time (years)</b>	RCA or RCIS = 1-2, MCA = 1-3+	5-10+	1-3+
<b>CDFW Fees</b>	RCA = \$22,000 RCIS = \$28,500 MCA = TBD	none	\$103,000
<b>Managing Entity</b>	RCIS Proponent MCA Sponsor → Landowner	Implementing Entity	Bank Sponsor → Landowner
<b>Commitment</b>	Update/revise RCIS, Meet/maintain performance	Acquire Reserve, Meet/maintain goals & objectives	Meet/maintain performance
<b>Regional conservation</b>	Major development indicated, voluntary regional conservation	Planned development, conservation commitment	When associated with NCCP/HCP or other regional plan
<b>Endangered &amp; Fully Protected Species</b>	Not a take permit; benefits from actions; MCAs can meet permit obligations	Take permit coverage including fully protected species	Not a take permit; bank credits can meet permit obligations
<b>Duration (years)</b>	10, renewable until MCA credits sold & MCA is closed	30 – 75, typically	Until credits sold and bank is closed
<b>Funding Source</b>	Investments, grants, donations, credit sales	Mitigation fees, grants, donations	Investments, credit sales

Table Courtesy of California Department of Fish and Wildlife

There are trade-offs to consider when choosing which type of plan to develop if no HCP/NCCP or RCIS exists. However, if an HCP/NCCP does exist, an RCIS can add to or support it by complementing the plan's conservation strategy. Several current draft RCISs have been prepared alongside other regional plans. For example, the Santa Clara County RCIS (SCCRIS) area includes the permit area of the Santa Clara Valley Habitat Plan (an HCP/NCCP), implemented by the Santa Clara Valley Habitat Agency. The SCCRCIS was developed in coordination with the Santa Clara Valley Habitat Agency to ensure that it complements and is consistent with the Habitat Plan's conservation strategy (as required by AB 2087) both within and beyond the Habitat Plan's permit area. The SCCRCIS builds on the Habitat's Plan's conservation goals, objectives, and reserve design to "fill in the gaps" that are not addressed by the Habitat Plan, both in geography and in resources described in its CDFW consistency letter<sup>7</sup>.

In another example, the Yolo RCIS covers the same geography as the Yolo County HCP/NCCP. The Yolo Habitat Conservancy, as the RCIS proponent, explained its interest in the RCIS in its submission letter to CDFW as allowing it to cover additional species and natural communities. While the Yolo Habitat Conservancy is the RCIS proponent, the question of the Implementation

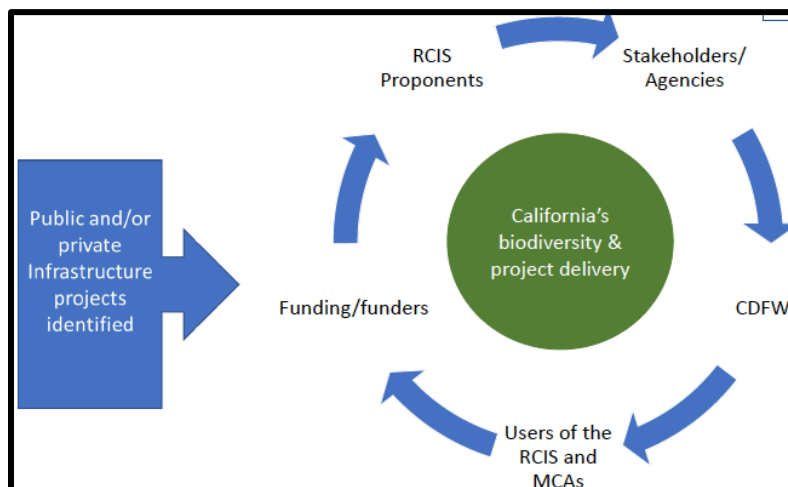
<sup>7</sup> [https://www.openspaceauthority.org/system/user\\_files/Documents/SCCRISConsistencyHP\\_Signed.pdf](https://www.openspaceauthority.org/system/user_files/Documents/SCCRISConsistencyHP_Signed.pdf)

Sponsor has not yet been determined. To help assess that decision Yolo County prepared an Implementation Sponsor description<sup>8</sup> that includes required and optional responsibilities.

## V. Long-term viability and value creation

Travis Hemmen of Westervelt Ecological Services led a discussion about maximizing the value of the RCIS Program. He believes California is adding value by working on regional conservation. Travis gave his perspective as a member of the mitigation banking industry. He asked the group: *How can we maximize the benefits for projects to ensure an RCIS is providing value to users and is an enduring tool?* He

asked the group to suggest ways that RCISs can create value. He described the federal overlay, mentioning the current trend of states assuming the responsibility of implementing federal regulation of waterways. Similarly, states that implement the ESA, may be more active in listing species. Travis's presentation included "the RCIS benefits cycle" (shown above and in Appendix document 3) created by The Nature Conservancy (TNC) to illustrate how RCISs could provide value to the range of stakeholders interested in conservation and project delivery efficiencies.



The discussion turned to the question as to how to incentivize engagement with private land owners, including farmers. The group discussed concerns about mapping private lands, and that it is important to not oversell mitigation opportunities to individuals. A representative from the Mid-Sacramento River RCIS noted that in their work in the regional flood planning process, they realized that there was no way to get to conservation strategy goals without working lands. The RCIS helped them to coordinate with working lands in concert with other strategies and plans.

The group talked about the importance of funding. Travis asked: *Is this program going to be an incentive or a disincentive for the marketplace?* Liz O'Donoghue of TNC referenced Regional Advance Mitigation Planning Program research that private investors are interested in advance mitigation projects but need to know that there is a framework for and successful demonstration of advance mitigation approval, and that approach provides equal or greater benefit than traditional project-by-project mitigation.<sup>9</sup> Travis indicated that public agencies will need to demonstrate the value before private funders will be interested.

<sup>8</sup> Yolo Habitat Conservancy- [https://docs.wixstatic.com/ugd/8f41bd\\_01cdcf4ad3434d31a49e5b46ec0cca13.pdf](https://docs.wixstatic.com/ugd/8f41bd_01cdcf4ad3434d31a49e5b46ec0cca13.pdf)

<sup>9</sup> *Funding and Financing for a Regional Advance Mitigation Planning Program in the Bay Area*. Final Report, March 26, 2016. Economics & Planning Systems, Inc. Document included in the Appendix.



### Mitigation Credit Agreements

Meeting participants expressed specific interest that programmatic MCAs should be allowed and that the process to develop and approve MCAs should be as efficient as possible.

Once an RCIS is approved by CDFW, an applicant may prepare an MCA and request its approval by CDFW. The MCA identifies the type and number of proposed credits from conservation or habitat enhancement actions, as well as the terms and conditions under which those credits may be used. MCAs enable advance mitigation, which is compensatory mitigation by projects for estimated impacts on ecological resources and other natural resources that is implemented prior to impact occurring and is consistent with the regional conservation priorities identified in an RCIS.

CDFW is developing guidance and MCA guidelines on how MCAs are transferred, sold, and used credits will be tracked, among other topics.



### Funding regional strategies and implementation

There was much discussion about the need for funding to support RCIS planning and implementation. RCIS development can be funded by the public agency that creates the RCIS in collaboration with different stakeholders and other entities in the region, through public, private or philanthropic funds. For example, the San Bernardino County Transportation Authority is working with the County of San Bernardino to fund an RCIS that includes both the Valley and High Desert.

There are a number of grant programs that provide funding opportunities for the RCIS Program, including:

- Proposition 68
  - o \$5 million for developing RCISs
  - o \$18 million for grants including wildlife corridor infrastructure
- Agencies - transportation, water, other local agencies with planning and project funding
- Others - NGOs, philanthropic institutions, propositions
- Regional Advance Mitigation Planning - (SHC§800 et seq., SB 1, SB 103)
  - o SB 103 provides CalTrans with no less than \$30 million a year for four years (\$120 million total) for the Advance Mitigation Program that could be used for MCA projects.



## VI. Summary

Meeting participants expressed excitement about the RCIS Program because:

- It identifies priority conservation actions to guide voluntary public and private investments to conserve rare species and sensitive habitat.
- RCISs can be developed within a relatively short timeframe (one to two years) compared to other regional conservation planning processes that typically take many years to complete.
- An RCIS can support compensatory mitigation needs for a range of state and federal laws, including the Federal Endangered Species Act (ESA), California Endangered Species Act (CESA), the California Environmental Quality Act (CEQA), and Lake or Streambed Alteration requirements of the California Fish and Game Code.
- RCISs build on the guidance in the State Wildlife Action Plans (CDFW 2015) to address the pressures and stressors facing species of greatest conservation need and build on previous conservation investments.
- The RCIS Program enables the use of habitat enhancement actions as compensatory mitigation for temporary impacts.
- A RCIS can help expedite delivery of public infrastructure projects by facilitating regional advance mitigation planning and implementation.



Public agencies across California have expressed interest in developing RCISs to address mitigation needs associated with a wide variety of infrastructure projects (flood control, renewable energy, transportation, water supply management, water delivery, urban development, etc.) and as a mechanism to support carbon offset programs, mitigation bank siting, and sustainable management of working lands.

As described above, meeting participants described the importance of RCISs working in the local context and shared examples of successes to date to improve regional conservation planning.

Participants recognized that the RCIS Program is new; and that practitioners will need to grapple with complexities in order to meet the high expectations for the program. Challenges such as efficiency in the costs of development and approval, demonstrated success in developing and implementing these programs, public engagement, and multi-agency involvement were identified as critical issues to resolve for success.

## VII. Next steps and resources

### Next steps

Before adjourning, the group discussed priorities to help create an RCIS community of practice.

Suggestions included:

- Gathering again in the coming year, perhaps in Southern California
- Conducting staff trainings, perhaps regionally
- Focusing efforts to improve agency coordination
- Identifying specific issues that could be discussed via webinar or a collaboration space
- Creating a list serve so that participants and those interested in the RCIS Program can keep in touch and share information

There was strong interest in a second workshop in 2019, with emphasis on best practices identified as a result of expected RCIS approvals, RCIS implementation activities, and MCA projects.

### Resources and references

Below are resources to assist RCIS sponsors, practitioners and participating agencies. Some of the resources, such as the example MOU, were mentioned in the Meeting. Additional resources have been added to answer questions that came up in the Meeting.

### Regional Conservation Investment Strategies

Approved RCIS Program documents are posted on the CDFW web page

(<https://www.wildlife.ca.gov/Conservation/Planning/Regional-Conservation/Documents>).

Efforts underway include:

- Santa Clara County RCIS in Santa Clara and San Benito Counties
- East Bay RCIS in Alameda and Contra Costa Counties
- Yolo RCIS in Yolo County
- Mid-Sacramento Valley RCIS in Colusa and Sutter Counties
- RCIS for a portion of San Bernardino County
- Antelope Valley RCIS in northern Los Angeles County

In addition to the six active RCISs, other areas discussing the potential of developing an RCIS, including the North Coast, Monterey County, Sonoma County, L.A. Metro area, Baylands (north San Francisco Bay), flood control regions of the Central Valley, Sierra/Tahoe, southern San Joaquin Valley, portions of Orange County, portions of San Diego County and the Salton Sea.

### RCIS Program overviews

- CDFW maintains the webpage (<https://www.wildlife.ca.gov/conservation/planning/regional-conservation>) on the Regional Conservation Investment Strategies Program and an FAQ document to answer frequently asked questions. The webpage also contains RCIS Program Guidelines, updated in September 2018.

- Defenders of Wildlife, October 2017, “California RCIS Program: Components and Benefits” includes the benefits of the program and contains a detailed glossary and acronym list<sup>10</sup>.

Planning and mitigation requirements, including comparisons of RCIS to approaches:

- Wetland and Stream Mitigation: Handbook for Land Trusts. This 155-page handbook by the Environmental Law Institute and Land Trust Alliance includes a description of section 404 (Clean Water Act) and Section 10 (ESA) programs<sup>11</sup>.
- Regional Advance Mitigation Needs and Feasibility Assessment for Metro. This plan prepared by ICF discusses the RCIS and other California conservation planning and mitigation approaches<sup>12</sup>.
- Section 3.9 of the Santa Clara County RCIS provides a Monitoring and Adaptive Management Framework to be used for developing adaptive management plans for each MCA in the RCIS area<sup>13</sup>.

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<sup>10</sup>[https://www.researchgate.net/profile/Thomas\\_Egan6/publication/320386859\\_California%27s\\_Regional\\_Conservation\\_Investment\\_Strategy\\_Program\\_Components\\_and\\_Benefits/links/59e12023aca2724cbfdb7123/Californias-Regional-Conservation-Investment-Strategy-Program-Components-and-Benefits.pdf](https://www.researchgate.net/profile/Thomas_Egan6/publication/320386859_California%27s_Regional_Conservation_Investment_Strategy_Program_Components_and_Benefits/links/59e12023aca2724cbfdb7123/Californias-Regional-Conservation-Investment-Strategy-Program-Components-and-Benefits.pdf)

<sup>11</sup> <https://www.eli.org/research-report/wetland-and-stream-mitigation-handbook-land-trusts>

<sup>12</sup> [http://media.metro.net/projects\\_studies/sustainability/images/Metro\\_RCIS-RAMP\\_Needs%26Feasibility\\_Report\\_2018-06.pdf](http://media.metro.net/projects_studies/sustainability/images/Metro_RCIS-RAMP_Needs%26Feasibility_Report_2018-06.pdf)

<sup>13</sup> <https://www.openspaceauthority.org/conservation/current-projects/regional-conservation-investment-strategy.html>