

DRAFT Scope of Work For

Salinity Policy Group Management and Programs with CV SALTS Coordination

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1 Program Proposal

This document is provided as a draft for review and comment. The purpose of this draft is to continue the facilitated meetings and programs under the Salinity Policy Group and specific programs prioritized and funded by the stakeholders.

This work is needed to extend and continue the committee’s meetings and success and enhance communication of all parties working with the committee. This effort requires a consultant capable of providing in-depth policy, technical and facilitation skills with

experience in planning, developing and implementing salinity projects and management programs. This experience is critical to the success of the program.

1.1 Proposed Scope and Efforts

The scope of work and efforts undertaken by the program would be based on the direction of the Taskforce or Committee and the Board. The joint nature of the work allows cooperation among the members, funding partners and with the Regional Board staff.

Scope of work for the first year in six month segment would include coordination and facilitation of general meetings on behalf of the Committee Chairs and the Salinity Group/Regional Board. Additionally, there are likely several programs that the group will reach consensus to begin, as funding is developed with the Funding Partners. These efforts are the areas of salt sources and quantities and public education and outreach effort and a best practices report.

1.2 Funding Partners

This program proposal is segmented to provide the ability to fund segments of work until sufficient funding is available to proceed in a continuous manner. Most segments are approximately \$50,000 in accordance with the existing funding sources. Funding Partners are those agencies, associations, districts and others that provide significant funding for the efforts of the Salinity Policy Group. Funding is currently available from the California Association of Sanitation Agencies (CASA), the Central Valley Clean Water Association (CVCWA), the City of Tracy and Mountain House CSD. Additional funding will likely be available from Supplemental Environmental Project (SEP) funds.

The minimum revenue needed for the first year would be approximately \$150,000. This would keep meetings and critical efforts ongoing and initiate other efforts. The full first year budget is estimated at \$300,000 to \$400,000 depending on the scope of efforts and the number of Funding Partners.

Entities required to participate by the Board may have a minimum participation level to be set by the Board. The budget can be adjusted based on the scope of efforts and the number of participants. The larger the program and number of participants the lower the cost to each participant and the greater the savings to each entity. Documentation and contracts required to complete this work are included in the scope of this proposal.

2 Task 1 – Project Management

Consultant will provide ongoing information on the progress of the tasks listed below in a monthly report and at meetings requested by the Contract Manager and Funding Partners. This status will include cost to date and accomplishments coordinated with invoices presented to the Contract manager and Funding Partners. Consultant will review progress and management of other efforts to keep all tasks coordinated. Coordination meetings by teleconference with the Funding Partners and Salty 5 are included in this task. Reporting of funding received and expended for the committee is included in this task. This task is priced as integral to Task 2 and 3.

3 Task 2 – Group Meeting Coordination and Facilitation

Salinity Group meetings are the critical portion of the efforts to date and will be very important in the coming year. The development of the program depends on continued focused efforts. The ongoing program management, administration and coordination of efforts are critical.

3.1 Monthly/Semi-Monthly Meetings and Agenda Coordination

The budget proposed the annual meeting calendar be set in six month segments. Each segment includes agenda setting and coordination with the Executive Committee, Committee chairs and Regional Board staff. Agenda's will be finalized and transmitted to the Regional Board staff to distribute to the database via email for each meeting. Meetings will be held on a monthly or semi-monthly basis depending on committee and requirements of the committee. The Executive, Technical Advisory, Economic and Social Cost, and the Public Education and Outreach committees are different in nature and require different programs and agendas.

Consultant will attend all meetings and facilitate process of the meetings in cooperation with the Chair. Estimate six in person meetings during this task including travel, expenses including limited materials. Limited teleconferences are budgeted for meetings where in person attendance is not required. Consultant will also note additional items to add to the agenda the next regular meeting of the committee. Consultant will review any minutes or notes taken at the meeting for accuracy and for agenda items or follow-up items. Consultant will participate in policy and strategy meetings and discussions to provide alternative views. Consultant will document these efforts in brief informal reports to Contract Manager and Funding Partners.

Consultant will work with Funding Partners, Executive Committee and the Regional Board staff to maintain continuity in the program and fund the additional 6 month segments.

4 Task 3 – Regional Meetings and Program Development

4.1 Planning and Scheduling

Consultant will plan and schedule in cooperation with the Funding Partners, Executive Committee and Regional Board Staff meetings with critical parties to the Salinity Policy Task Force. These meeting will be to develop awareness, understanding and funding for the efforts of the Salinity Policy Group. Consultant will prepare talking points or assemble materials and information for the meeting. Consultant will document these efforts in brief informal reports to Contract Manager and Funding Partners.

4.2 Documentation and Follow-up

Consultant will prepare draft letter and other follow-up materials to the meeting attendees. Consultant will also document meeting and keep records of meetings and action items assigned to any of the committees. As grant opportunities are identified meeting could be scheduled to provide the opportunity for Consultant to collaborate with stakeholder organizations to prepare one or more grant applications to appropriate

government entities, foundations to fund the ongoing and special effort of the group. SEP grants would be ideal for water quality plan efforts and greatly assist the efforts of the group.

5 Task 4 – Cooperative Salinity Sources Report

5.1 Identification of Salt Sources in the Central Valley

This task will be coordinated with the prior work of the State Board (Dr. Jerry Horner) and with the technical and economic and social cost committees. The effort will be to engage stakeholders to better document the sources, quantities and composition of the salts generated, imported or mobilized in the Central Valley. Because it would be difficult or impossible for any report to capture all salt in the Region, the report will draw on existing work identified by staff and the Committees and provide a format and method to collect information available from stakeholders. Data request emails or letters will be provided to stakeholders that the committees believe may have useful data on Salinity for this effort.

5.2 Committee Review, Consensus and Final Report

After the majority of the data is collected it will be compiled and aggregated to provide tables/charts that the committees and the stakeholders can review. Based on the data review the committee will decide if sufficient data is available or reliable assumptions can be made to complete the report or if additional effort is required. If additional information is required, additional funding may be required to complete the report. Provided the data has usable location information mapping of the source locations, where appropriate will be attempted. Significant sources of salt in the region would be visually displayed. This part of the project would be done with intern or graduate/undergraduate students or agency staff and deferred if they are not available.

6 Task 5 – Public Education and Outreach Efforts

A critical area of effort for the Salinity Policy Group is communication, specifically to continue and expand the education and outreach efforts in accordance with Executive and Public Education and outreach direction. Consultant will document these efforts in brief informal reports to Contract Manager and Funding Partners.

6.1 Public Outreach Plan

The Salinity Policy Group has only a high level Communication Plan. A more detailed Public Outreach plan would detail the needs to be addressed and efforts. The Consultant would work with the committees and add detail and list of priority actions to be completed or to identify funding to complete. This plan would be developed with feedback and suggestions of the Public Education and Outreach Committee. The draft would be available for all committees to review. Review comments will be incorporated and the finalized plan will guide the next efforts of the outreach.

6.2 Updated Expanded Brochure

Additional materials in supporting the outreach that is needed is an updated brochure focused on the highest priority audience and including information that is generated during the other work.

The document would be updated and expanded. This document would include updated information on Salinity Policy Group activities and successes. Until there are regularly funded programs for education and outreach this would be an effective and useful program toward achieving the Policy Group mission. This effort could be combined with in-house efforts of one or more agency or entity to reduce costs and increase effectiveness. The cost estimate includes developing the concept and with committee participation and producing text, graphics and layout. After review and approval printing of at least 1000 copies is included. If funding is available by state board contract, alternative language versions can be produced for later reproduction.

6.3 Video Distribution and Public Relations Support

The Public Broadcasting System video was produced with the Water Education Foundation and has limited budget and scope to distribute and promote the video. This task would expand the distribution of the 20 minute or hour long version of the video to critical stakeholder in the Region.

Maximizing the effectiveness of the video is a very cost effective effort. By providing copies of the video to legislators and their staffs as well as other critical regional leaders the video is an opportunity to provide them with broad information and background in the issue. The cost estimate includes cover letter and video/viewers guide/brochure mailing to 200 critical legislators and regional leaders. Additionally it includes approximately \$5000 for PR for the video to support the committee as the video is shown on public television and to encourage others to show it.

6.4 Web Site Registration

One inexpensive method of keeping people in touch with the information generated by the Salinity Policy Group and the stakeholders is to better utilize the Regional Boards website. Augmenting it with its own address such as www.cvsalts.org and registering to search engines will increase visibility to the general public and allow an easier link to be printed on materials. Should expanded web functionality be needed in the future by the Salinity Policy Group the domain can be pointed to another server with expanded services.

6.5 Fact sheets

The Public Education and Outreach Committee is beginning the development of information that can be put into fact sheets such as shown in the following topics:

1. What Community Leaders Can Do
2. What Irrigation and Water Suppliers Can Do
3. What Home/Property Owners Can Do/Bill suffer
4. What Water Treatment Industry Can Do
5. What ____ Industry Can Do

6. What Teachers Can Do
7. What Pool supply/construction Can Do
8. Other language Translations if possible by State Board Contract

The cost estimate includes development draft and final version of three fact sheets developed with Education and Executive Committee direction. The fact sheets would be selected by the committee and reviewed at the draft level. Comments will be incorporated and upon approval printing a minimum of 1000 copies. Policy Group participants will have the opportunity to purchase press overrun at lower cost and room will be left for imprint of local district contacts.

6.6 Public Service Announcements

Because of the ability to air/print public service announcements at no cost, several participants have recommended preparing materials for radio, newspaper and the web that would allow short messages on salinity to be distributed. Once produced budget is included in the cost estimate to coordinate and promote play and print in media across the region.

7 Task 6 – Workshops/Seminar Development

Feedback on the workshops held in spring 2008 was positive and participants indicated they were much more informed on salinity. Many participants were not active stakeholders in the existing CV SALTS efforts.

A series of workshops or seminars would be produced that would increase awareness and provide detailed information from active participants in the committees. These could focus on practical implementation, academic/research, Industry/business/commercial or other basis determined by the committees and Funding Partners.

The scope for this task would include developing the program outline with the committees and the Funding Partners. Once the general plan is developed a flyer or announcement can be edited and produced for electronic distribution. Consultant will assist committees and Regional Board staff in outreach for the workshop or seminars. Consultant will assist with the selection and administration of speakers and presenters and arrange for low cost venues and equipment and support the registration and facilitate the meeting. The cost estimate includes two workshops on one day or less duration.

Actual direction, format, duration and content will be developed with the committees and Funding Partners. Upon completion a brief final report will be produced to document the results of the meetings.

8 Task 7 – Salinity Controls Best Practice Survey

Under this task a brief review and survey of best practices in salinity control for wastewater or one or more industry areas would be produced. A brief review of available research on practices demonstrated to be effective, cost efficient, practical to implement and broadly applicable to the region. After the review is completed a discussed by the

committees a brief survey for efforts that are in common use will be developed and distributed to Salinity Policy Group stakeholders and other industry participants.

The draft report will be reviewed and approved by the committees. The results of this survey and the basic research will be a good background and best practices overview that can be used for identifying appropriate technologies and practices as well as industry benchmarking for the industry or discharger segment.

9 Task 8 – Second Six Months - Group Meeting Coordination/Project Management

Task 8 is similar to Tasks 1, 2 and 3 above and includes the same efforts. Some efficiency is planned and has been incorporated into the tasks and the assumption that some other tasks will be in process as well. Costing for this task also assumes that meetings will be held to minimize travel and other expenses.

10 Deliverables

Informal, draft and final reports and memoranda will be prepared and provided to the Contact Manager and Funding Partners as indicated in the tasks above. Monthly reports will be submitted to accompany and document all activities and to match and support costs invoiced.

11 Schedule

This work is critical to the success of the program and should be executed in accordance with the schedule described below which is based on a notice to proceed of July 1, 2008.

Tasks 1, 2 and 3 are dependent on each other and will proceed from July 1, 2008. All here tasks will completed by December 31, 2008. Task 1 Project management will extend to January 31, 2009 to provide closeout of accounting and invoicing if not extended. Some efforts may be placed on hold due to schedule changes of the program. The remaining tasks are not fully funded and will proceed as funding is assured. It is hoped that Task 4 can be accomplished prior to the end of 2008. Tasks 5, 6, and 7 are subject to the availability of funding and may be modified to fit available funding and priorities.

12 Budget

The draft budget provided on the following page documents the estimated costs. It is shown in an initial priority order. In other words Tasks 1-3 are critical task 4 is more important than 5 and so on. This order can be adjusted by the Executive Committee and the Funding Partners. Tasks would start as full funding is available or the task is modified to fit funding available. Tasks were priced as Integrated Planning and Management Tasks for discussion. Some work may be able to be done by agency staff and in some cases sub-contractors or others may be more efficient at certain tasks which will help stretch the funding provided by the funding partners.

CV SALTS Coordination for Funding Partners

Task	Cost	Basis of Estimate	
1 Project Management	\$ 5,400	4 hrs/mo	6 months
Expenses	\$ 486	9%	
2 Group Meeting Coordination and Facilitation	\$ 27,000	20 hrs/meeting	6 meetings
Travel and Expenses	\$ 3,600	\$ 600	6 meetings
3 Regional Meetings Outreach Documentation	\$ 13,500	10 hrs/meeting	6 meetings
Total	\$ 49,986	Funding CASA/CVCWA and Others	
4 Cooperative Salinity Sources Report	\$ 13,500	60 Hrs	1 outline
Data Requests Spreadsheets	\$ 4,500	20 Hrs	1 emailed
Data Compilation and Follow-up	\$ 13,500	60 Hrs	1 email/call
Preliminary Draft Report for peer review	\$ 9,000	40 Hrs	1 report
Incorporate changes Draft #2	\$ 9,000	40 Hrs	1 report
Total	\$ 49,500	Funding CVCWA, CASA and _____	
5 Public Education and Outreach Management	\$ 2,700	4 hrs/meeting	3 meetings
Travel and Expenses	\$ 1,200	\$ 400	3 meetings
Public Outreach Plan	\$ 13,500	60 hrs	1 Draft/Final
Updated Expanded Brochure Concept/Coord.	\$ 4,500	20 hrs	1 draft
Text Graphics and Revision	\$ 2,000		1 brochure
Graphics Layout and Revision	\$ 3,000		1 brochure
Printing 1000 copies plus materials	\$ 3,000	\$ 3.00 each	1 brochure
Video Distribution	\$ 1,400	200 copies/mail	7 per mail
PR support around video	\$ 5,250	Estimate	
Web Registration updates	\$ 1,900	Estimate	
Fact Sheets concept outline development	\$ 3,375	\$ 1,125 developed	3 fact sheets
Text Content	\$ 3,375	\$ 1,125	3
Graphics Layout and Revision	\$ 1,800	\$ 600	3
Final and Printing 1000	\$ 3,000	1,000	\$3 fact sheets
Total	\$ 50,000		
5a Public Service Announcements	\$ 10,500	\$ 3,500 per PSA	3 PSA
Distribution	\$ 2,800	Estimate time and materials	
Coordinate Media efforts	\$ 11,700	52 hrs	1
Total	\$ 25,000		
6 Workshops/Seminar Development	\$ 10,800	48 hrs/meeting	1
Flyer and outreach	\$ 5,625	25 hrs/meeting	1
Travel and Expenses	\$ 1,400	\$ 700	2 meetings
Presentation	\$ 10,800	24 hrs/meeting	2 meetings
Speakers and Program	\$ 2,000	Estimate	
Venue and Expenses	\$ 4,000	Estimate	
Technical Assistance	\$ 7,200	8 hrs/meeting	4 meetings
Wrap-up Report	\$ 5,400	24 hrs/meeting	1
Total	\$ 41,825		
7 Cooperative Salinity Best Practices Report	\$ 13,500	60 Hrs	1 outline
Data Requests	\$ 4,500	20 Hrs	1 emailed
Data Compilation and Follow-up	\$ 13,500	60 Hrs	1 email/call
Preliminary Draft Report for peer review	\$ 9,000	40 Hrs	1 report
Incorporate changes Draft #2	\$ 9,000	40 Hrs	1 report
Total	\$ 49,500		
8 Second 6 Months Group Meetings and PM	\$ 50,000	See tasks 1, 2 and 3 above	
Total	\$ 50,000		
Total All Tasks	\$ 315,811		