

San Francisco Bay Joint Venture Project Adoption and Prioritization Criteria to Help Guide SFBJV Funding Recommendations

Introduction

The goal of the San Francisco Bay Joint Venture (www.sfbayjv.org) is to protect, restore, increase, and enhance all types of wetlands, riparian habitats, and associated uplands throughout the San Francisco Bay region to benefit birds, fish, and other wildlife.

One purpose of the San Francisco Bay Joint Venture (SFBJV or JV) is to provide the coordination of partnerships and resources to facilitate wetland and riparian habitat protection, restoration, enhancement, and monitoring projects throughout the San Francisco Bay, and the coasts of Sonoma, Marin, and San Mateo Counties. The SFBJV helps to identify potential partnerships and/or assistance needed to enhance the success of projects.

The SFBJV maintains updated information on wetland and riparian projects being conducted by SFBJV partners. The JV provides funding recommendations to the Wildlife Conservation Board, the State Coastal Conservancy, and other funding entities. Projects have been identified in the Implementation Strategy, *Restoring the Estuary*, or subsequently adopted by the JV Restoration Strategy/Technical Committee. All projects tracked by the JV address the goals established in *Restoring the Estuary* and contribute to the Joint Venture targets for habitat protection and restoration.

This document describes SFBJV project submission, review, and prioritization procedures and outlines project adoption and prioritization criteria.

The Conservation Committee of the SFBJV is composed of representatives of state and federal resource agencies, NGOs, and local governments with biological expertise, and Joint Venture partners conducting wetland projects. The SFBJV strives to promote projects with broad geographic representation although status and habitat value are primary.

The Conservation Committee reviews projects based on the project adoption and prioritization criteria listed below and the guidelines of the appropriate funding agency, where applicable. Where appropriate, the project proponent or SFBJV will inform potential funders of adopted projects and request feedback on potential concerns and additional information needed. SFBJV projects are categorized into tiered priority lists according to how ready they are to be implemented, as described in the project prioritization section of this document.

It is essential that the SFBJV has the ability to react and pursue opportunities that arise unexpectedly and require immediate action. While this document describes the standard criteria and process for SFBJV project review, there will be occasional instances when the process may be streamlined.

Project submission, review, and tracking

- 1) Information about a project is submitted by the lead partner to the SFBJV through the *San Francisco Bay Joint Venture Project Tracking System* at <https://ptrack.ecoatlas.org/>
- 2) Information about the project is submitted to the Conservation Committee, and the lead partner requests the project be “adopted” by SFBJV and added to the main database of JV projects.
- 3) JV staff track project updates through the online system and contact partners as necessary for continuous updating of project information and status.
- 4) The tiered project lists, as described in the project prioritization section of this document, are generated and reviewed at least annually by the Conservation Committee.
- 5) In addition to an annual review, the Conservation Committee will also compare the tiered lists of projects with a funding agency’s criteria to provide funding priorities when requested by the Wildlife Conservation Board, Coastal Conservancy, or other funding entity.
- 6) Although the SFBJV Management Board has vested the Conservation Committee with the responsibility of providing recommendations and priorities when multiple project priorities are requested by a funding agency, the SFBJV Management Board considers the recommended list of projects.
- 7) Throughout the process, the JV staff will provide funding agencies with information about the status of projects.

II. Project Adoption Criteria

The criteria for determining whether a project is suitable for adoption by the SFBJV are divided into two types, Essential and Desirable. Projects are required to meet all Essential Criteria to be adopted as a SFBJV project. The Desirable Criteria are used in combination with the information in the next section on Prioritization Criteria to further assess each project.

Essential Criteria:

- 1) The project is specified in or implements the recommendations in at least one of the following:
 - a. **Habitat Goals Report** (provide short description & report page # or other supporting documentation):
 - b. **Upland Habitat Goals Report**, Priority 1 or 2 streams (provide short description & report page # or other supporting documentation):
 - c. **SFBJV Implementation Strategy**, Restoring the Estuary (provide short description & report page # or other supporting documentation):
 - d. **Riparian Bird Conservation Plan** (provide short description & report page # or

other supporting documentation):

- e. A **special project** outside the geographic range of the SFBJV that may have the potential to be adopted due to extraordinary significance (provide short description & relevant specific documentation):
- 2) The project advances the goals of the Joint Venture, by:
- a. **Protecting** habitat for target species described in Restoring the Estuary, “Key” species in the Habitat Goals report, California Partners in Flight & the Riparian Habitat Joint Venture’s Riparian Bird Conservation Plan, or The California Bird Species of Special Concern list (provide # of acres protected & list of target species):
 - b. **Restoring** habitat for target species described in Restoring the Estuary “Key” species in Habitat Goals report, California Partners in Flight & the Riparian Habitat Joint Venture’s Riparian Bird Conservation Plan, or The California Bird Species of Special Concern list (provide # of acres restored & list of target species):
 - c. **Enhancing** habitat for target species described in Restoring the Estuary “Key” species in Habitat Goals report, California Partners in Flight & the Riparian Habitat Joint Venture’s Riparian Bird Conservation Plan, or The California Bird Species of Special Concern list (provide # of acres enhanced, describe enhancement activities & list of target species):
- 3) The purpose and potential of the project has a strong biological foundation. Biological assessments should demonstrate that the project will result in the protection, restoration or enhancement of habitat for target species. Documentation may include biological surveys, monitoring reports, known significant habitat values, Upland Habitat Goals Biodiversity Portfolio Report, historical ecology surveys, or field verification by the Department of Fish and Wildlife, US Fish and Wildlife Service, or other qualified entity.
- a. Is a **biological assessment(s)** available for the property (yes or no, if yes, provide the assessment):
 - b. Are **biological assessments** for **nearby areas** that are representative of the existing or potential biological values of the property (yes or no, if yes, provide the assessment):
- 4) The project is being implemented by a partnership of organizations and agencies, each contributing resources or expertise to ensure the project will be completed in a timely way with the best biological foundations for long-term habitat value (list each partner and their roles):

Desirable Criteria

- 1) The project benefits > 1 species as documented above
- 2) The project protects, restores, or enhances > 1 habitat type as defined in the SFBJV Implementation Plan
- 3) The project provides linkage/connectivity to other wildlife areas such as a State Wildlife Area, National Wildlife Refuge, County Reserve or Open Space Preserve, or a permanently protected privately owned/managed wildlife sanctuary
- 4) The project is adjacent to/within the existing natural area
- 5) The project is planning for the effects of climate change

III. Prioritization Criteria

Once a project has been adopted by the SFBJV, it is prioritized on the basis of:

- 1) Readiness to be implemented
- 2) Urgency
- 3) Cost
- 4) Connectivity
- 5) Community support

A. Readiness

Readiness is the primary criterion used to determine upon which tiered list the projects should be placed. SFBJV projects are categorized into tiered priority lists according to how ready they are to be implemented, as described below.

Three levels of readiness are defined:

1. **Tier 1** – The Tier 1 list is comprised of those projects that can be implemented immediately when funding is received. These projects are considered to be “Ready to Go.”

The project is determined to be “Ready to Go,” if it satisfies the following conditions:

- Impediments are identified and remedied.
- Sources of funding are identified including funding already in place, the amount needed to complete the project, and sources and amounts of potential matching funding. Match is at the appropriate level given the landowner’s or grantee’s assets.
- Future ownership and management arrangements have been described.
 - ❑ For acquisition projects, there is a willing seller with documented verification such as a letter from the landowner
 - ❑ For acquisition where restoration is recommended, a conceptual plan for

- restoration exists or a planning process has been proposed
 - ❑ Potential sources of liability have been identified and measures have been identified to limit the liability to a level acceptable to the funding entities, potential owner, and manager of the property
 - ❑ Permits and environmental documents are either in place or will be secured in the foreseeable future.
2. **Tier 2** – Tier 2 projects have unresolved impediments. Tier 2 projects can be “Ready to Go” (Tier 1) once any impediments are remedied. Tier 2 projects require JV staff or partner assistance to elevate them to the Tier 1 status. Projects can shift between tiered lists if the “Ready to Go” status changes.
 3. **Other Active Projects**- The JV also maintains a list of High Activity “Other” projects that are active, but don’t meet the criteria of Tier 1 and Tier 2. JV partners and staff invest time in implementing these active projects.

In addition to readiness, the following four additional prioritization criteria are considered, with none of these criteria given more weight than any other. Each project is considered on an individual basis.

B. Urgency

The project is urgent, based on at least one of the following:

- Lack of restoration will contribute to habitat degradation
- Acquisition projects may be given priority over restoration or enhancement because of timeliness and threat when a window of opportunity might close, such as matching funds with limited time of availability, or a property when the degree of threat by development is high

C. Cost

- Lack of restoration will contribute to an increase in future costs as habitat degrades
- Cost efficiency can be improved when the restoration of one site can be tied to that of another
- The project is good value for the cost

D. Habitat Connectivity

- The project provides wildlife corridors and will contribute significantly to completing a complex of nearby projects or natural habitat

E. Community Support

- There is widespread and active community support for the project as demonstrated by community involvement in protection/restoration or local funding support

Online Resources:

- SFBJV Implementation Strategy: Restoring the Estuary (2022): <https://sfbayjv.org/conservation/planning>
- Point Blue's Climate Smart Restoration Toolkit: <https://www.pointblue.org/climate-smart-restoration-toolkit>
- California Wildlife Species of Special Concern – <https://wildlife.ca.gov/Conservation/SSC>
- SFEI Baylands Ecosystem Habitat Goals Report– <https://www.sfei.org/projects/baylandsgoals>
- SF Bay Area Upland Habitat Goals <http://climate.calcommons.org/project/san-francisco-bay-area-upland-habitat-goals>