

Island County, Washington
REQUEST FOR PROPOSALS (RFP)
Shoreline Master Program Update

Send Proposal Packages to:

Robert H. Pederson, Director
Island County Planning and Community Development Department
P.O. Box 5000
1 N.E. 6th Street
Coupeville, Washington 98239

RFP – SMP Update

RFP Release Date: June 18, 2010

**Proposal Due Date: July 12th, 2010 at 4:30 p.m. PST, Island County
Courthouse Annex, Coupeville, WA.**

PROJECT OVERVIEW

PURPOSE OF THIS PROJECT

Island County is seeking a qualified consultant to assist in updating the Shoreline Master Program (SMP) to be consistent with the Shoreline Master Program Guidelines (WAC 173.26) and Growth Management Act (RCW 36.70.A).

Island County is comprised entirely of islands and has ± miles of shoreline..

The SMP update process will involve a participation process with the public, local and state agencies; an inventory of shoreline conditions; analysis of shoreline conditions to address any special issues; assigning or developing proposed environmental designations; development of shoreline goals, policies, and regulations; development of a restoration plan with implementation strategies; and final review and adoption by the Department of Ecology.

The majority of the work will be focused on: 1) public outreach and participation; 2) review and application of Best Available Science; 3) Inventory and analysis and development of goals, policies, and regulations; 4) cumulative impact analysis; 5) demonstration of no net loss; and 6) restoration plans.

MINIMUM QUALIFICATIONS

The consultant selected must have expertise in public participation and outreach programs; ecological analyses including coastal geology and processes; GIS mapping; shoreline resource inventory; application of best available science principles, and Washington land use policy and regulations. Experience updating a Shoreline Master Program (SMP) implementing the Shoreline Management Act (SMA) and Growth Management Act is preferred.

PROJECT MANAGEMENT

Island County will provide project management services for this project with input and review by the Washington State Department of Ecology. Ecology's Grant Project Manager for the County is Barry Wenger out of the Bellingham office.

PROJECT BUDGET

The County received a grant from Ecology and budgeted an amount of approximately \$ 230,000 for consultant services.

PROJECT SCHEDULE

The schedule for the project is established in the scope of work for this grant.

SCOPE OF WORK

PROJECT DESCRIPTION

Island County's current SMP must be updated to be consistent with the Washington State Department of Ecology's Shoreline Master Program Guidelines. This will involve a participation process with the public, local and state agencies, and affected tribes; an inventory of shoreline conditions, analysis of shoreline conditions to address any special issues; assigning or revising proposed environment designations; development of shoreline goals, policies, and regulations for the SMP, and final review and adoption.

The consultant will attend meetings as necessary throughout the development, review and adoption of the SMP to present information or provide technical support to County staff. County staff will be responsible for preparing ordinances and managing the public process.

The attached scope of work is provided by Ecology with specific information and dates set by the County included in italics. Once a consultant contract is signed, a final schedule will be provided to Ecology.

Some of the tasks below will be completed by County staff with the assistance of the Consultant and others by the Consultant. Some of the tasks included in this scope of work will overlap in time and may be completed simultaneously with other tasks. Some tasks are iterative (e.g., analyzing cumulative impacts, developing regulations) and may involve various steps conducted at different times in the process before they are completed.

INTRODUCTION

This section of the RFP details how the County will manage and direct the RFP process. The purpose of these procedures is to ensure that the County receives proposals that are the result of an open and competitive process, and that proposers receive fair and equitable treatment in the solicitation, receipt, and review of their proposals. The County may reject the proposal of any proposer who fails to comply with any of the requirements of this Section.

COMMUNICATIONS WITH ISLAND COUNTY

All communication concerning this Project should be directed to:

Robert H. Pederson, AICP
Island County Planning and Community Development Department
P.O. Box 5000
1 N.E. 6th Street
Coupeville, Washington 98239

Telephone and email: (360) 679-7344 or b.pederson@co.island.wa.us

Information obtained from sources other than the project manager with respect to this project may not be accurate.

PROPOSALS DUE

To be considered, five (5) copies of the Proposal must be received at the address above no later than 4:30 p.m. on July 12th, 2010. Proposers are solely responsible for ensuring that proposals are delivered on time. Proposals received after the due date and time will be returned unopened. Faxed proposals will not be accepted.

COST OF PROPOSAL

This RFP does not, under any circumstance, commit the County to pay any costs incurred by any proposer in the submission of a proposal. The proposer is responsible for all cost associated with response to this RFP.

REJECTION OF PROPOSALS

The Island County reserves the right to reject any or all proposals at any time with no penalty and to waive immaterial defect and minor irregularities in proposals.

PROPOSAL DISPOSITION

All materials submitted in response to this RFP shall become the property of the Island County upon delivery.

PROPOSAL CONTENT

Proposals should be no longer than 10 pages plus attachments and include the following:

- ❖ **Firm/Team Information:** Firm name, address, phone, fax, and email. Identify the project manager and all team members including subcontractors proposed to be

working on the project and indicate the estimated total hours each will spend on the project.

- ❖ **Scope of Services/Budget:** The scope of work in this RFP is provided by Ecology to all grantees. Describe your approach to and understanding of the project, specifically addressing each of the Tasks included in this RFP. A budget is included at the end of this RFP. Please use this table to indicate the estimated hours and budget to be spent on each task with a brief supporting explanation. Please include your estimate or understanding of which tasks would be required to be performed by County staff.

- ❖ **Relevant Experience:** Describe the relevant background and experience of the firm including years in business. Describe the relevant experience of your team members and subcontractors in the areas of shoreline planning; ecological analyses; GIS mapping; shoreline resource inventory; Washington land use policy and regulation; and public outreach and participation. The proposer shall commit that staff identified in its Proposal will actually perform the assigned work.
 - **References:** Provide at least two relevant references for your firm and for each team member and subcontractor with project description, client name, address, and phone numbers, exact responsibility of consultant on project, and whether experience is firm experience or individual experience.

- ❖ **Project Schedule:** The project schedule will be finalized with the selected consultant. Please provide a statement of acknowledgment that your firm/team can meet the schedule and meet the tasks required for each of the years as listed in the Project Schedule and summarized below.

EVALUATION AND SELECTION

ANTICIPATED CONSULTANT SELECTION TIME SCHEDULE

The Island County anticipates reviewing all proposals, selecting firms for interviews and starting the project on July 30, 2010, with the selected firm based on the following tentative schedule:

- ❖ Shortlist of Firms – July 16 , 2010
- ❖ Interviews – week of July 19, 2010
- ❖ Notification of Selected Firm/Team – July 23, 2010
- ❖ Contract Completion – July 30, 2010
- ❖ Project Start Date – August 1, 2010
- ❖ Project Completion Date –December 31, 2012

EVALUATION PROCESS

Written proposals will be reviewed and evaluated by the Island County Community Development Department and selected reviewers. The proposers with the highest score will be invited for interviews. Interviews will be conducted by an interview team. The Planning Director reserves the right to conduct second interviews if necessary.

If chosen, the consultant will be informed of the committee's decision within 5 working days of the interview. The contract will be executed between the selected consultant and the Island County by July 30, 2010.

SCORING PROPOSALS

The proposals will be evaluated as follows:

- ❖ Previous experience of key personnel in the areas required - 40 points
- ❖ Budget optimizes value to the Island County - 40 points
- ❖ Approach and project understanding - 20 points

SMA Grant Agreement No. G1100____

between the

State of Washington Department of Ecology

and

Island County Washington

Project: Comprehensive Shoreline Master Program Update

THIS is a binding agreement entered into by and between the State of Washington, Department of Ecology, (PO Box 47600, Olympia, Washington, 98504-7600) hereinafter referred to as the "DEPARTMENT" or as "ECOLOGY" and Island County, Washington, hereinafter referred to as the "RECIPIENT" to carry out activities described herein, and as authorized by the Washington State Legislature under Chapter 173-26 of the Washington Administrative Code (WAC) for shoreline implementation.

Name of RECIPIENT: Island County, Washington

Department: Planning and Community Development
Department

Address: P.O. Box 5000
Coupeville, Washington 98239

Project Manager for RECIPIENT: Robert H. Pederson - Director

Telephone Number: (360) 679-7344

E-mail address: b.pederson@co.island.wa.us

Fiscal Contact for RECIPIENT: Paula Bradshaw

Telephone Number: (360) 679-7802

E-mail Address: paulab@co.island.wa.us

Payee on Warrant: Island County
P.O. Box 5000
Coupeville, Washington 98239

Project Officer for ECOLOGY: **Barry A. Wenger**
SEA Program, Bellingham Regional Office
Washington State Department of Ecology

Telephone Number: (360) – 715-5220
E-mail address: bwen461@ecy.wa.gov

The source of funds provided by the DEPARTMENT are from the 2009-2011 and 2011-2013 Washington State Biennia’s General Fund for Shoreline Implementation, §302; and the Local Toxics Control Account, §302, Subsection 7.*

Maximum Grant Amount, Fiscal Year 1 (7/1/10-6/30/11): \$ 180,000
Maximum Grant Amount, Fiscal Years 2 and 3 (7/1/11– 6/30/13): \$ 270,000
Total: \$ 450,000

State Maximum Cost Share Rate over all three years: 100% UP TO a maximum of \$ 450,000

The effective date of this agreement is from July 1, 2010 to June 30, 2013.*

*Years 2 and 3 funding are subject to legislative appropriation in the 2011-2013 Biennium.

Project Location Information (the following section is to be completed by the applicant for Ecology’s development of the agreement)

County: Island

| | | | |
|---------------------------------------|--------|-------------------------------|-----|
| <u>State Legislative District</u> | No. 10 | % of project within District? | 100 |
| <u>Federal Congressional District</u> | No. 2 | % of project within District? | 100 |

Watershed/Drainage Basin (Water Resources Inventory Area)

General Note

This Standard Scope of Work is presented in three one-year increments that correspond to the steps needed to prepare a locally adopted comprehensive Shoreline Master Program update. The planning tasks in this scope of work correspond to the phases in Figure 1: Shoreline Master Program Planning Process. “Tasks” A, B, and C are common to all phases of the scope of work and are conducted throughout the update process; whereas “phases” are sequent specific work programs.

- **Year 1** includes the tasks addressed in SMP update Phases 1 & 2.
- **Year 2** addresses the tasks in Phase 3.
- **Year 3** completes the tasks contained in Phases 4 and 5.

Some of the tasks included in this scope of work will overlap in time and may be completed simultaneously with other tasks. Some tasks are iterative (e.g., analyzing cumulative impacts, developing regulations) and may involve various steps conducted at different times in the process before they are completed.

Project Deliverables

The (City or County) shall perform the following tasks with deliverables sent to Ecology’s Project Officer, indicated on Page 1 of this agreement. Select deliverables will require a *draft* submittal as well as a *final* submittal. All deliverables per the scope of work below will be in Microsoft Word format, include accompanying maps as applicable and submitted in one (1) digital and one (1) hard copy version with the following exceptions:

- **Final Draft SMP:** 1 digital and 3 hard copies.
- **Quarterly Progress Reports and Payment Requests:** one hard copy each to be submitted with original signatures in blue ink, **due** October 20, January 20, April 20, and July 20 for each year the grant or SMP process is active.

Scope of Work

Project Description:

Island County will complete an update of the Shoreline Master Program (SMP) that is developed and adopted in a manner consistent with the procedural and substantive requirements of the Shoreline Management Act (SMA) and its implementing rules, including the Shoreline Master Program Guidelines (Guidelines). The SMP update process includes completion of inventory and analysis reports with corresponding maps and illustrations that characterize shoreline ecological conditions; development of shoreline policies, environment designations, and use regulations; as well as analysis of cumulative impacts and uses, preparation of a shoreline restoration plan, and a formal local adoption process. The Recipient will incorporate public participation in all phases of the SMP update. The Recipient may use consultant support as appropriate.

Work Program: The Recipient shall perform the following tasks and phases:

Task A: Coordination

Coordinate throughout the SMP update process with Ecology and other applicable state agencies, neighboring jurisdictions, and Indian tribes as provided in the Guidelines and SMA procedural rules. In addition, consult with all other appropriate entities which may have useful scientific, technical, or cultural information, including federal agencies, watershed management planning units, salmon recovery lead entities, universities and other institutions, local individual outdoor recreationists and conservationists, and organizations with special expertise representing these interests.

Coordinate with adjacent jurisdictions that share areas within shoreline jurisdiction (for example, jurisdictions on the same lake or stream) for the purpose of efficiently using grant funds; sharing information and methods of analysis; drafting compatible SMP policies, regulations, environment designations; and coordinating public involvement.

Attend Ecology-sponsored coordination meetings, which occur on a regular basis, for the duration of the project. Provide Ecology opportunities for review of draft deliverables at appropriate intervals. When requested, the recipient shall include a written response to Ecology's comments on draft deliverables.

Ecology will provide ongoing technical assistance on data sources and approaches, and will evaluate consistency of deliverables with the Shoreline Management Act and applicable guidelines throughout the update process.

Deliverables:

1. Documentation of contacts in quarterly progress reports

Dates Due: October 20, January 20, April 20, and July 20 of each year for three years.

2. Written responses to Ecology's comments on draft deliverables, when requested. (May be provided in email format.)

Date Due: Following receipt of Ecology's comments.

**Task B: Secure qualified consultant services and Interlocal Agreements
(if applicable)**

B.1: Secure qualified consultant services: The Recipient will prepare a detailed scope of work for consultant services consistent with the grant scope of work, publish a Request for Proposals, form a review committee to evaluate respondents, and enter into a contract with the selected consultant. *To ensure budgetary compatibility among all parties, the consultant's budget will be consistent with the budget as established in this grant agreement*

Deliverable: Final executed consulting contract,

Date Due: August 30, 2010

Task C: Implement Public Participation Plan

Throughout Phases 1 through 5 of the SMP update process, the RECIPIENT shall inform and involve the public in updating the SMP consistent with the objectives of the Shoreline Management Act (see RCW 90.58.130) and WAC 173-26. Public participation should actively engage all shoreline users and will include a technical advisory committees, sharing information at open houses and workshops, conducting user surveys, and maintaining an interactive world wide web site. Public participation shall continue through the formal public hearing and local SMP adoption process.

Deliverable: Documentation of public participation in quarterly progress reports.

Dates Due: January 20, April 20, July 20, and October 20, each year for three years.

The Recipient shall prepare a complete, locally approved Draft SMP by completing Phases 1 through 5 described below and in the *Shoreline Master Program Planning Process*:

http://www.ecy.wa.gov/programs/sea/grants/smp/pdf/SMP_Planning_Process.pdf

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Year 1

PHASE 1: Preliminary Assessment of Shoreline Jurisdiction and Public Participation Plan

Task 1.1: Identify preliminary shoreline jurisdiction

Identify the preliminary geographic scope for the comprehensive SMP update project. Use available information to map required and optional Shorelines of the State as defined by statute and rule in order to identify the initial area under SMA shoreline jurisdiction. The shoreline jurisdiction area will be refined during later tasks. The preliminary jurisdiction mapping will include

- Statutory minimum areas consisting of the following Shorelines, Shorelines of Statewide Significance and Shorelands (per RCW 90.58.030(2)). This includes national forests and other federal or tribal areas that are not under sole jurisdiction of the federal government or tribes.
 - Rivers and streams with mean annual flow over 20 cubic feet per second.
 - Lakes and reservoirs exceeding 20 acres.
 - Associated wetlands of these areas.

- Lands extending landward 200 feet from the ordinary high water mark, floodways and floodplain areas landward 200 feet from the ordinary high water mark.

Optional areas to be considered for inclusion in the SMP:

- Floodplains: All or part of the floodplain landward of the 200-foot mark from the floodway (per RCW 90.58.030(2)(f)(i)).
- Buffers: Buffers necessary for the protection of Critical Areas as defined in Growth Management Act regulations (per RCW 90.58.030(2)(f)(ii)).
- Future annexation areas: For cities, SMPs may include Shoreline Environment predesignation within designated unincorporated Urban Growth Areas.

Contact the Ecology project officer for the most recent maps of stream segments meeting the 20 cfs threshold and other available information. If federal or tribal areas are proposed for exclusion, provide documentation that the area is under sole jurisdiction which precludes application of local and state authorities.

Deliverable: Preliminary jurisdiction map (digital) of Shorelines of the State subject to local SMP

Date Due: October 2010

Task 1.2: Prepare plan for public participation

Throughout Phases 1 through 5 of the SMP update planning process, inform and involve the public in updating the SMP consistent with the Shoreline Management Act (see RCW 90.58.130) and WAC 173-26. Prepare a public participation plan that identifies specific objectives, outreach strategies, key parties (Planning Commission and elected officials, shoreline property owners, state agencies, Tribes, local residents, neighboring jurisdictions, etc.), and establishes timelines for public participation activities. Engage all parties early and continuously in the update process, particularly those relevant individual recreationists and conservationists or organizations that may not typically seek involvement in new shoreline regulations. Documenting all public outreach and public events related to SMP development is required.

Ecology recommends that the public participation process be coordinated by a designated facilitator (with responsibilities distinct from the local planner managing the update effort).

Website - A website will be developed for the project to provide a forum for the public to obtain information regarding the Shoreline Management Program update and provide comments and input related to the project. The website will contain details related to the development of the Shoreline Management Program update including a list of contacts (local and state), an events calendar, meeting summaries, regulatory mandates (RCW and

WAC), the current version of the Shoreline Management Program, fact sheets on key issues, the scope of work and a list of participating agencies. The website will be kept current and be maintained throughout the duration of the project. Island County has already created a link on the existing Planning and Community Development Department website to convey this information until the SMP website is developed.

Citizens Forums- Natural resource management workshops will be held in key locations throughout Island County to provide a forum for the community to obtain information regarding the importance of natural resource protection and management. The workshops will be a forum for citizen's to obtain information regarding natural resources and provide comments and input relating to the update of the Shoreline Management Program. The workshops will begin in January 2011 ending in August 2011.

Natural Resource Management Workshops - In addition to the above listed public outreach and involvement strategies, a directed outreach effort will be made to existing users of the shoreline environment. Anticipated contacts include The Port of South Whidbey, The Port of Coupeville, charter boat operators, recreational boaters, Washington State Parks, WSU beach watchers, etc. These parties will be invited to participate on an individual basis and in the natural resources management workshops described in the above Task..

Direct and Newspaper Outreach – Island County benefits from extensive local newspaper presence, including the Whidbey News Times, Whidbey Examiner, South Whidbey Record, and the Stanwood Camano News. Other local press resources include the Whidbey Marketplace and the Navigator. The recipient will issue press releases and invite detailed articles about the SMP update with each publication. Display ads (in addition to the more formal legal notices) will also be published for each of the citizen forums and natural resource management workshops noted in the Tasks above.

Island County has also prepared a direct notice to all property owners in Island County of the upcoming SMP update. This one page notice will be inserted to the Value Notices mailed to all property owners by the Island County Assessor in early June of 2010.

Deliverables:

1. Public participation plan (digital copy).
2. Public participation updates in quarterly progress reports.

Date Due: October 2010

Task 1.3: Demonstrate how Phase 1 complies with the Guidelines

Fill in SMP Submittal Checklist for the tasks that you have completed under Phase 1.

Deliverables: An SMP Submittal Checklist completed as relevant to task will be submitted with each quarterly report

Date Due: January 20, April 20, July 20, and October 20, each year for three years.

PHASE 2: Shoreline Inventory, Analysis & Characterization

Task 2.1: Conduct shoreline inventory

Compile all pertinent and reasonably available data, plans, studies, inventories, maps and other applicable information. Collect the following information to the extent that such information is relevant and reasonably obtainable:

- Shorelines of the State (all marine shorelines, streams >20 cfs mean annual flow, lakes >20 acres, and shorelands) as defined in RCW 90.58.030, located in the Recipient's jurisdiction.
- General location of channel migration zones, floodplains, and the floodway.
- Critical areas, including wetlands, aquifer recharge areas, fish and wildlife conservation areas, geologically hazardous areas, and frequently flooded areas, as defined in RCW 36.70A, the Growth Management Act.
- Shoreline and adjacent land use patterns/density and transportation and utility facilities, including the extent of existing structures, impervious surfaces, vegetation and shoreline modifications within shoreline jurisdiction. Platted lots including undeveloped lots (except those not developable under local subdivision ordinance).
- Degraded areas and sites with potential for ecological restoration.
- Areas of special interest, such as priority habitats, rapidly developing waterfronts, previously identified toxic or hazardous material clean-up sites, and eroding shorelines.
- Existing and potential shoreline public access sites, including public rights-of-way and utility corridors. The inventory will include descriptions of recorded public access easements, their prescribed use, maintenance, and terms.
- Historical aerial photographs documenting past conditions to assist in preparing an analysis of cumulative impacts of development.
- Archaeological and historic resources in shoreline jurisdiction.
- Policies and regulations in shoreland and adjacent areas that affect shorelines, such as surface water management and land use plans and regulations (Critical Areas Ordinance, flood ordinance, etc.).

Deliverables:

1. Draft list of inventory data sources for review and comment.
2. Digital working maps of inventory information displayed at appropriate scales.

Date Due: December 2010

(Note: Please provide Ecology with sufficient time, approximately 30 days, to review and comment on the draft inventory data sources list and working maps.)

Task 2.2: Conduct shoreline analysis

Conducting the shoreline analysis will result in a shoreline characterization report. The report will define the ecological functions of the shorelines in your jurisdiction, identify shoreline management challenges, and present recommendations for protection and restoration of shoreline functions. (Please see description of this report in Task 2.3.)

Conduct an analysis of the inventory information and data collected in Task 2.1 as it relates to development of an effective SMP. Develop a characterization of the ecosystem processes and shoreline functions. Identify opportunities for shoreline protection and restoration. Identify current and potential public access sites. Conduct a shoreline use analysis. Identify measures and actions to protect and restore shoreline functions and ecosystem wide processes (e.g. appropriate land use activities or environment designations, regulations, development standards, etc.) These tasks should be conducted as they are relevant to shorelines in your jurisdiction.

(Note: For most Puget Sound jurisdictions, the Department of Ecology will prepare a broad-scale characterization of ecosystem-wide processes. This information will be provided to jurisdictions in Spring 2010.)

2.2.1 Characterize ecosystem-wide processes

This characterization will include a coarse-scale analysis of the broader area that influences the shoreline jurisdiction. It will include a narrative with reference to maps that describes and illustrates the processes in the larger drainage area that are linked to the shoreline through hydrologic flows. These processes include the uptake, transport and deposition of sediment, nutrients, woody debris, and pollutants. Specifically, this characterization will:

- Present the geographic context for shoreline jurisdiction areas –with geology, soils, topography, vegetation, and drainage patterns of the watersheds. Describe how these large scale upland areas relate to and affect the shoreline. Review existing

regional watershed or natural resource related plans for inclusion of relevant information.

- Identify areas throughout the watersheds, or, within and beyond shoreline jurisdiction, that are important to maintaining shoreline ecological functions (e.g. wetlands, forest cover, floodplains, higher permeability deposits, discharge, organic/clay soils, etc.)
- Identify areas that are key impairments (e.g. forest clearing, impervious cover, channelized streams, altered wetlands, roads and ditches, dams/diversions, groundwater withdrawals, and listed impairments such as those published in the 303(d) list.
- Identify opportunities for protection/restoration of upland and adjacent areas essential for maintaining shoreline processes and function.

2.2.2 Characterize shoreline functions

This will be a more detailed analysis of the shoreline jurisdiction that includes a narrative with reference to maps and GIS data. Delineate shoreline reaches based on land use and ecological processes (such as man-made physical features, stream confluences, or littoral drift cell boundaries). Describe functions that are associated with each shoreline reach. Specifically, this characterization will:

- Detail the physical, biological, and land-use components within the shoreline jurisdiction.
- Evaluate and assess shoreline ecological function using current scientific understanding of the relationship between the conditions of ecosystem-wide processes and functions within the Town's shoreline jurisdiction. Identify functions that are healthy, functions that are adversely impacted and functions that may have existed and are now missing.

2.2.3 Conduct Shoreline Use Analysis; analyze opportunities for public access

- Conduct shoreline use analysis:
 - Identify current patterns of land uses in shoreline areas.
 - Identify likely or projected uses in shoreline areas.
 - As applicable, analyze potential use conflicts and identify possible adverse impacts those could have on current ecological functions.
 - Estimate future demand for shoreline space consistent with WAC 173-26-201(3)(d)(ii) requirements.
 - Identify opportunities and demand for SMA preferred uses and potential use conflicts based on current use patterns and projected trends.
- Identify current public access sites and opportunities for future access sites.

Task 2.3 Prepare shoreline inventory and characterization report

Prepare a shoreline inventory and characterization report with accompanying maps that provides an analysis of the inventory data, ecosystem characterization and shoreline functions, shoreline use and public access findings as it relates to development of an effective SMP. The report will present findings and recommendations in a way that is useful for making SMP planning decisions. This report will provide a foundation for establishing environment designations, policies and implementing regulations. The report should identify data gaps, focusing on information that would be useful to support shoreline program development and implementation. The report should:

- Present the geographic and jurisdictional context for the SMP update.
- Characterize ecosystem processes and functions.
- Present reach level analysis information. Detailed information on shoreline reaches will identify opportunities and constraints in:
 - Protecting intact and restoring degraded ecological processes and functions.
 - Addressing the requirements for shorelines of statewide significance per WAC 173-26-251.
 - Providing public access.
 - Accommodating appropriate water-oriented uses.
- Identify potential use conflicts to inform environment designation and allowed use decisions.
- Develop shoreline management measures for protection and restoration of ecological functions, SMP policies, regulations, and environment designations based on the findings of the inventory and characterization. (For example, recommendations may include appropriate land use activities or environment designations, regulations, development standards, restoration and protection actions and strategies.)
- Organize relevant data for efficient review and use in the cumulative impact analysis. (A table is recommended.)

The report will also include refined shoreline jurisdiction boundaries and synthesis maps at appropriate viewing scales that will inform the report and illustrate findings that correspond with the narrative. For example, the user will be introduced to the area with coarser resolution vicinity maps indicating the county location in the state and delineating county and watershed boundaries. Maps at the shoreline reach scale will clearly differentiate the land and water contained within SMA jurisdiction from adjacent lands and contributing drainages. Maps at this scale will present the significant geologic, hydrologic, and ecologic features most essential to maintaining shoreline form and function and those land uses that may have altered upland processes influencing shoreline function. The reach scale maps also will indicate applicable inventory features such as known presence of listed species, critical riparian or aquatic vegetation, existing land uses, designated critical areas, and shoreline modifications. Potential areas for shoreline uses, public access, restoration and/or protection will be indicated. The portfolio will include a comprehensive list and map of public access to shorelines.

Deliverables: Shoreline characterization and analysis report with map portfolio that addresses the above task requirements in 2.1, 2.2 and 2.3, above.

Due Date: Draft May 2011 Final: August 2011.

(Note: Please provide Ecology with sufficient time, approximately 45 to 60 days, to review and comment on the draft characterization and analysis report.)

Task 2.4: Demonstrate how Phase 2 complies with the Guidelines

Fill in SMP Submittal Checklist for the tasks that you have completed under Phase 2.

Deliverable: An SMP Submittal Checklist completed as relevant to task (adding incrementally to earlier completed tasks) will be submitted with each quarterly report.

Date Due: January 20, April 20, July 20, and October 20, each year for three years.

Year 2

PHASE 3: Complete Draft SMP and Cumulative Impacts Analysis

Task 3.1 Conduct community visioning process

Conduct a community visioning process that includes as many citizens as possible to determine goals for future use of the shoreline. This process should be conducted with respect to the findings of the shoreline inventory and characterization report. The visioning process will identify shoreline problems and opportunities. It will result in a strategy for shoreline uses, public access, resource protection, and restoration that is consistent with SMA policy and SMP Guidelines objectives.

Deliverable: Strategy for shoreline uses, public access, resource protection, and restoration

Date Due: September 2011

Task 3.2: Develop general SMP goals, policies and regulations

Prepare general shoreline goals and policies that are applicable throughout the area within shoreline jurisdiction. Optional SMP components may include general SMP regulations that apply in all environment designations.

Task 3.3: Develop environment designations

Develop environment designations that are appropriate to current waterfront conditions per the findings of the shoreline inventory and characterization. Shoreline environment designations may be comprised of those recommended in the guidelines; the existing local SMP; unique, locally developed environments; or any combination of these, so long as they are consistent with WAC 173-26-211 environment designation criteria.

Prepare draft maps illustrating the land and water area contained within mapped shoreline designation boundaries together with justification and rationale for the proposed designations. Boundaries of shoreline environment designations shall be clearly mapped. Optional shoreline jurisdiction areas, including entire floodplains and buffers for critical areas, should be mapped and designated if they are included within shoreline jurisdiction. A map clearly illustrating existing designations compared to proposed designations should be prepared. A narrative rationale describing reasons for maintaining or changing the designations shall be included.

Task 3.4: Develop environment-specific shoreline use & modification policies, regulations and standards

Prepare draft policies and regulations for environment designations, all uses discussed in the SMP Guidelines, and shoreline modifications. The draft policies and regulations for shoreline environment designations shall, at a minimum, identify:

- Shoreline use and modification activity goals and policies.
- Shoreline uses and modifications that are prohibited and allowed by Substantial Development Permit or Conditional Use Permit.
- Bulk dimensional standards (buffers, setback, density, etc).
- Shoreline modification activity standards.
- Any local policies or regulations adopted by reference, if relied upon to satisfy SMA or guidelines requirements.

Optional SMP components may include:

- Shoreline use and dimensional standards listed in matrices, by environment designation. (*Strongly encouraged.*)

Task 3.5 Develop SMP administrative provisions

Prepare draft provisions for SMP administration, including necessary elements and timelines for permit administration, compliance, and enforcement. Statements about the role of Ecology in permit decisions should be included.

A definitions section should be prepared. Definitions should be particular to SMP administration, consistent with the SMP's implementing rules. Definitions should be clearly and concisely written.

Optional SMP components may include additional administrative provisions, if not inconsistent with SMA procedural rules and the guidelines. An SMP "user's guide" may be prepared.

Deliverables:

1. Complete Draft SMP including:
 - Draft general goals and policies and optional general regulations. (Task 3.2)
 - Draft environment designations and draft environment maps. (Task 3.3)
 - Draft environment-specific shoreline use and modification policies, regulations, and standards. (Task 3.4)
 - Draft administrative provisions. (Task 3.5)
 - Maps showing environment designations within shoreline jurisdiction

2. An SMP Submittal Checklist completed as relevant to task (adding incrementally to earlier completed tasks).

Date Due: Initial Draft: October 2011 Final Draft: December 2011

(Note: Please provide Ecology with sufficient time, approximately 45 to 60 days, to review and comment on the draft documents.)

Task 3.6 Prepare preliminary cumulative impacts analysis

Evaluate and analyze draft SMP policies, regulations and environment designations to show how they achieve no net loss of shoreline ecological functions during the planning period. The analysis will include incremental and cumulative impacts of future uses and development allowed by the proposed SMP as an ongoing part of the update process. The analysis will identify how proposed SMP regulations and standards and restoration activities will avoid and offset expected impacts of future permitted and exempt shoreline development. Scenario-

based impacts analysis is encouraged. The cumulative impacts analysis may need to be revised if the initial document shows that cumulative impacts would result from the draft SMP.

(Note: The preliminary cumulative impacts analysis should be submitted at the same time as the Draft SMP.)

Deliverable: A cumulative impacts analysis of the SMP demonstrating how no net loss of ecological functions will be achieved over time at in the jurisdiction.

Date Due: June 2012

(Note: Please provide Ecology with sufficient time, approximately 45 to 60 days, to review and comment on the draft cumulative impacts analysis.)

Task 3.7: Demonstrate how Phase 3 complies with the Guidelines

Fill in SMP Submittal Checklist for the tasks that you have completed under Phase 3.

Deliverables: An SMP Submittal Checklist completed as relevant to task (adding incrementally to earlier completed tasks).

Date Due: January 20, April 20, July 20, and October 20, each year for three years.

Year 3

PHASE 4: Restoration Planning, Revisiting Phase 3 Products

As Necessary

Task 4.1 Prepare restoration plan

Based on the Inventory and Characterization report, develop a plan for restoration of impaired ecological functions in specific shoreline reaches. Restoration plans should include:

- Identification of degraded areas, impaired ecological functions, and sites with potential for ecological restoration.
- Goals and priorities for restoration of degraded areas and impaired ecological functions.
- Existing and ongoing restoration projects and programs.
- Additional projects needed to achieve restoration goals and implementation strategies, including identification of prospective funding.
- Times and benchmarks for achieving restoration goals.
- Mechanisms to ensure that restoration projects and programs will be implemented.

Consult with organizations conducting restoration work for assistance in developing restoration strategies. The restoration plan should identify overlaps in how and where restoration work is being conducted. An implementation strategy should include recommendations for coordination between groups doing restoration work. A list of specific prioritized restoration projects may be included as an appendix to the SMP.

Deliverable: A complete restoration plan and implementing strategy.

Dates Due: Draft: March 2012 Final: June 2012

(Note: Please provide Ecology with sufficient time, approximately 30 to 45 days, to review and comment on the draft restoration plan.)

Task 4.2: Revisit draft SMP and cumulative impacts analysis; finalize SMP jurisdiction maps

Based on findings in the cumulative impacts analysis, re-evaluate and revise the draft SMP environment designations, policies, and regulations in response to Ecology comments on the preliminary draft materials developed in Phase 3 as necessary to assure that they are adequate to achieve no net loss of ecological functions. Revise the cumulative impacts analysis as needed to reflect changes in the draft SMP. This version will be the Planning Commission recommended draft.

Prepare final jurisdiction maps (digital) of Shorelines of the State identified in Task 1.1 that will be subject to the local SMP.

Deliverables:

1. Revised designations, policies, and regulations that address the findings of the cumulative impacts analysis.
2. Revised cumulative impacts analysis.
3. Final SMP jurisdiction maps and boundary descriptions

Date Due: June 2012

(Note: Please provide Ecology with sufficient time, approximately 45 to 60 days, to review and comment on the revised draft SMP and other documents)

Task 4.3: Prepare a report that demonstrates how no net loss will be achieved

Prepare a report that demonstrates how the recommended shoreline management measures in Task 2.3, together with the findings of the cumulative impacts analysis and the restoration plan, are reflected in the proposed SMP and achieve no net loss.

Deliverables: A report that demonstrates how no net loss will be achieved through SMP implementation.

Date Due: June 2012

Task 4.4: Demonstrate how Phase 4 complies with the Guidelines

Fill in SMP Submittal Checklist for the tasks that you have completed under Phase 4.

Deliverables: An SMP Submittal Checklist completed as relevant to task (adding incrementally to earlier completed tasks).

Date Due: June 2012

PHASE 5: Local SMP Adoption Process

Conduct a local review and adoption process for the proposed SMP as provided in the SMA, WAC 173-26, and the State Environmental Policy Act. The SMP shall contain shoreline policies, regulations, environment designations, definitions, required administrative provisions, and a clear description of final SMP jurisdiction boundaries together with copies of any provisions adopted by reference.

Task 5.1: Assemble complete draft SMP

Assemble a complete draft SMP for Town Council review and approval and formal submittal to Ecology. This draft would include response to Ecology informal comments on the preliminary draft submitted under Tasks 4.3 and 4.4 deliverables.

Task 5.2: Complete SEPA review and documentation

Conduct and document SEPA review pursuant to chapter RWC 43.21C, the State Environmental Policy Act

Task 5.3: Provide GMA 60-day notice of intent to adopt

Upon conclusion of Tasks 5.1, and 5.2, local governments planning under the Growth Management Act must notify Ecology and the Department of Commerce of its intent to adopt the SMP as least sixty days in advance of final local approval, pursuant to RCW 36.70A.106 and WAC 173-26-100 (5).

Task 5.4: Hold public hearing

Hold at least one public hearing prior to local adoption of the draft SMP, consistent with the requirements of WAC 173-26-100. The names and mailing addresses of all interested parties providing comment shall be compiled.

Task 5.5: Prepare a responsiveness summary

Prior to adoption of the draft SMP by the local elected body, prepare a summary responding to all comments received during the public hearing and the public comment period, discussing how the draft SMP addresses the issues identified in each comment.

Task 5.6: Adopt SMP and submit to Ecology

Complete the adoption process for the SMP update and submit the locally-adopted Draft SMP to Ecology.

Task 5.7: Demonstrate how Phase 5 complies with the Guidelines

Fill in the SMP Submittal Checklist for the tasks that you have completed under Phase 5.

Deliverables:

1. A complete, locally adopted SMP including maps, with relevant supporting documentation. (Tasks 5.1 and 5.7)
2. SEPA products (checklist, MDNS or EIS; SEPA notice. (Task 5.2)
3. Evidence of compliance with GMA notice requirements. (Task 5.3)
4. Public hearing record. (Task 5.4)
5. Response to comments received. (Task 5.5)
6. A complete SMP Submittal Checklist.

Date Due: December 2012

Budget Summary and Conditions

Budget Conditions

For Puget Sound Recipients

Very Important Note: Due to state law, all state funds that are disbursed to local governments under these grants are appropriated in the state budget on a biennial basis. Funds appropriated for each biennia of the grant must be spent on eligible activities within that two-year period. Local governments are not allowed to carry unexpended funds past that date.

We are aware that state and local fiscal years are not on the same schedule; however, state law requires strict adherence to the state biennial funding cycles for state agreements. Grantees are strongly encouraged to actively manage their projects to ensure that spending occurs at budgeted levels within the time constraints specified on page one.

1. **Project Administration:** For the administration of this agreement the RECIPIENT must follow the current edition of the [Administrative Requirements for Ecology Grants and Loans](http://www.ecy.wa.gov/biblio/9118.html) (Yellow Book). <http://www.ecy.wa.gov/biblio/9118.html>
2. **Invoicing:**
 - Grants are awarded on a reimbursable basis. The Recipient initially pays project costs as they incur. Invoicing to Ecology is usually by quarter but not more often than once per month. Upon presentation of an invoice to Ecology, Ecology's share of the project is reimbursed to the Recipient.

- Expenditures will be monitored by the Ecology Fiscal Office for compliance with the budget (see below). Budget deviations are allowed between tasks (e.g., a grantee may spend less money on one task and more on another), but in no circumstances may the RECIPIENT exceed the total project cost. If the total of all budget deviations exceeds 10% of the entire project cost, the Ecology Project Officer may require a written budget redistribution. When submitting invoices to Ecology, **the RECIPIENT shall itemize all costs by task** and provide subtotals by task on Ecology's Form C2, Voucher Support Form. All payment requests must have forms A, B, C (and D if applicable), be accompanied by a commensurate progress report, and receive Ecology Project Officer approval before payment can be released.

NOTE: For payment requests, the RECIPIENT must use the Ecology forms provided. Otherwise, Ecology will return requests to the RECIPIENT for submittal on the correct forms.

- The RECIPIENT must **maintain complete backup documents** including but not limited to all invoiced costs and time sheets - signed and dated by employee and supervisor. The RECIPIENT must keep these expenses in grant files according to budget task for a period of three years after project completion and make them available at any time for inspection by the DEPARTMENT.
 - Requests for reimbursement must be **submitted at least quarterly** but not more than once per month by the RECIPIENT on state invoice voucher forms.
 - The **indirect rate must not exceed 25 percent** of direct (staff) labor and benefit costs. This rate covers space utilities, miscellaneous copying, telephone, motor pool, janitorial services, records storage, rental, county fiscal and legal services, etc. Items not included in this list must be reported with the first payment request and must remain consistent for the life of the grant.
 - **Right to Audit:** The Recipient agrees that payment(s) made under this grant shall be subject to reduction for amount charged thereto which are found after audit examination not to constitute allowable costs under this grant. The Recipient shall refund by check payable to the DEPARTMENT the amount of such reduction of payments under completed or terminated grants.
 - **Estimates:** The State Office of Financial Management (OFM) requires state agencies to estimate the status of grant funds for the fiscal year ending each June 30. Ecology must have these estimates to ensure sufficient funds are reserved to reimburse RECIPIENTS for expenditures incurred within that specific fiscal year, similar to a cash flow projection. To that end, Ecology will be contacting local governments near the end of each fiscal year for the dollar amount anticipated to be incurred for project costs through June 30 that have not as yet been submitted to Ecology for reimbursement.
4. **Final payment** of grant projects is contingent on receipt of viable work products as listed in the grant document.

5. **Funding Budget:**

The source of funds provided by the DEPARTMENT are from the 2009-2011 and 2011-2013 Washington State Biennia's General Fund for Shoreline Implementation, §302; and the Local Toxics Control Account, §302, Subsection 7.*

Maximum Grant Amount, Fiscal Year 1 (7/1/10-6/30/11): \$ 180,000

Maximum Grant Amount, Fiscal Years 2 and 3 (7/1/11– 6/30/13): \$ 270,000

Total: \$ 450,000

State Maximum Cost Share Rate over all three years: 100% UP TO a maximum of \$ 450,000

*Years 2 and 3 funding are subject to legislative appropriation in the 2011-2013 Biennium

Expenditure Budget

Note: If consultant services are involved in this project, the following budget must be adhered to by all parties to ensure consistent reporting. Expenditure reporting will follow the structure as indicated below.

| Phase / Task | Year 1 10-11 | Year 2 11-12 | Year 3 12-13 | Total Project |
|--|-----------------|-----------------|-----------------|------------------|
| Tasks Common to All Phases: | | | | |
| A. Project Coordination | 80,000 | 80,000 | 40,000 | 200,000 |
| B. Contracted Services | 80,000 | 90,000 | 45,000 | 215,000 |
| C. Implement Public Participation Plan | 20,000 | 10,000 | 5,000 | 35,000 |
| | 180,000 | 180,000 | 90,000 | 450,000 |

| | | | | |
|---|----------------|----------------|---------------|----------------|
| Phased Work: | | | | |
| 1. Preliminary Assessment / Public Participation Plan | 40,000 | 20,000 | 10,000 | 70,000 |
| 2. Shoreline Inventory, Analysis, and Characterization | 60,000 | | | 60,000 |
| 3. Complete Draft SMP and Cumulative Impacts Analysis | 45,000 | 110,000 | 30,000 | 185,000 |
| 4. Restoration Planning / Revisit Phase 3 products as necessary | 35,000 | 50,000 | 45,000 | 130,000 |
| 5. Local Adoption Process | | | 5,000 | 5,000 |
| Total | 180,000 | 180,000 | 90,000 | 450,000 |

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BUDGET & HOURS TABLE
(Include in Proposal Submittal)

Your proposal should include the following table which is set up as per the scope of work and schedule presented in the RFP. Please fill in the table with the \$245,000 grant for this contract where your company feels the most benefit to the County can be gained from your expertise. Estimate the hours spent on each task with the estimated budget for each task. You cannot spend more than \$,000 of the grant in Year 1.

In addition, if you feel additional funds would allow additional services needed based on your experience, please fill in additional funding and hours in *italics* below the estimates for the original grant.

The County does not guarantee that additional funding will be available in the County budget; however, this table will allow the Selection Committee to compare the services each firm can provide in assisting the Island County with their SMP Update.

Feel free to annotate the table to show what work would be completed by your firm/team and what work would be required to be completed by County Staff.

| Phase / Task (Coordinates with Scope of Work Phases/Tasks) | Year 2 | Year 2 | Year 3 |
|--|---------------|---------------|---------------|
| | | | |
| A. Secure Consult Services | | | |
| B. Project Coordination | | | |
| 1. Prelim Assessment / Public Participation Plan | | | |
| 1.1 Identify Preliminary Shoreline Jurisdiction | | | |
| 1.2 Prepare Plan for Public Participation | | | |
| 1.3 Demonstrate How Phase 1 Complies with the Guidelines | | | |
| 2. Shoreline Inventory, Analysis, and Characterization | | | |
| 2.1 Compare Shoreline Inventory | | | |
| 2.2 Conduct Shoreline Analysis | | | |
| 2.3 Prepare Shoreline Inventory & Characterization Report | | | |
| 2.4 Demonstrate How Phase 2 Complies with the Guidelines | | | |
| 3. Shoreline Policy, Environment Designation; Policy and Regulation Development / Cumulative Impacts Analysis | | | |
| 3.1 Conduct Community Visioning Process | | | |
| 3.2 Develop General SMP Goals, Policies & Regulations | | | |

| | | | |
|---|--|--|--|
| 3.3 Develop Environment Designations | | | |
| 3.4 Develop Environment-Specific Shoreline Use & Modification Policies, Regulations & Standards | | | |
| 3.5 Develop SMP Administrative Provisions | | | |
| 3.6 Prepare Preliminary Cumulative Impacts Analysis | | | |
| 3.7 Demonstrate How Phase 3 Complies with the Guidelines | | | |
| 4. Restoration Planning / Revisit Phase 3 products as | | | |
| 4.1 Prepare Restoration Plan | | | |
| 4.2 Revisit Draft SMP & Cumulative Impacts Analysis; Finalize SMP Jurisdiction Maps | | | |
| 4.3 Prepare a Report That Demonstrates How No Net Loss Will Be Achieved | | | |
| 4.4 Demonstrate How Phase 4 Complies with the Guidelines | | | |
| 5.1 Assemble Complete Draft SMP | | | |
| 5.2 Complete SEPA Review and Documentation | | | |
| 5.3 Provide GMA 60-Day Notice of Intent to Adopt | | | |
| 5.4 Hold Public Hearing | | | |
| 5.5 Prepare A Responsiveness Summary | | | |
| 5.6 Adopt SMP & submit to Ecology | | | |
| 5.7 Demonstrate How Phase 5 Complies with the Guidelines | | | |
| ECOLOGY REVIEW | | | |
| SUBTOTAL FOR ORIGINAL \$ 245,000 GRANT | | | |
| <i>Subtotal for Potential Additional Funding Request</i> | | | |
| <i>Subtotal for Both</i> | | | |