

**Lower San Joaquin River Committee  
Long-term Committee Manager  
June 2012**

**Scope of Work**

The Lower San Joaquin River Committee (LSJR Committee) was established by the Executive Committee of CV-SALTS with the expressed purpose of developing a Basin Plan Amendment to establish water quality objectives for salinity in the Lower San Joaquin River. The LSJR Committee is made up of stakeholders on the river and downstream who have volunteered their time to help guide and direct the basin plan amendment project. Due to the LSJR Committee's volunteer makeup it has become apparent that a paid Committee Manager is necessary to keep the committee's work moving toward completion. The LSJR Committee has prepared a preliminary draft workplan (workplan) for the development of water quality objectives for the San Joaquin River. The workplan includes, as an appendix, a project table that lists the major activities, subtasks for each activity and a timeline for completion of the activities and subtasks. The text of the workplan is included as Attachment 1 and the project table is included as Attachment 2.

The purpose of this scope of work is to describe the duties and responsibilities of a long-term Committee Manager (manager). The manager will serve until completion of the project, which is anticipated to be July 2014. In general, the interim manager will:

- Oversee committee activities
- Facilitate implementation of the workplan
- Complete specified workplan activities
- Initiate and ensure timely progress is made on other specified activities, and
- Provide the committee with leadership on development of the final draft basin plan amendment.

The workplan activities the manager will be entirely or partially responsible for have been identified and highlighted in attached table (Attachment 3). Those activities have been divided into the following categories:

- Project administration
- Communication, coordination, and outreach
- Initiation and management of certain workplan activity tasks
- Completion of certain workplan activities.

The discussion below addresses each of these categories.

## **1. Project Administration**

The objective of this work category is to provide project leadership and coordination, to ensure that meetings are efficient, productive, and project records are complete, to facilitate implementation of the workplan, and to provide assistance in contracting preparation and oversight.

### **A. Project Leadership**

The manager will provide leadership on a range of policy and technical issues, guidance and direction on updating and refining the project strategy, workplan, and/or budgets, identifying and prioritizing additional work that needs to be accomplished, and determining whether available resources are adequate to complete that work.

### **B. Committee Meeting Management, Facilitation, and Record Keeping**

The manager will be responsible for:

- meeting planning and facilitation to ensure meetings are efficient and productive
- preparation of committee meeting agendas and meeting materials, and timely distribution to committee members and interested parties
- development of a recommended method for ensuring that meeting communications and records are complete and available at all times, and
- insuring that the needed documentation (administrative) records for the draft basin plan amendment are maintained.

### **C. Workplan Implementation**

The LSJR Committee has developed a workplan that identifies and describes workplan tasks, and provides cost estimates and a schedule for completion of each task. The manager will have primary responsibility for facilitating and overseeing the implementation of the workplan.

### **D. Contracting Assistance**

The manager will assist the committee in determining needed technical contracts for workplan tasks and, once determined, will coordinate with the CV-SALTS technical project manager to insure scopes of work, criteria for evaluation of potential contractors, requests for qualifications and proposals, and contracts for work are completed. The activities that may need to be contracted include review of water quality criteria, identification of proposed water quality objectives, the technical analyses needed to characterize water quality and estimate baseline salt loading, economic analysis, and CEQA documentation. Other contracted activities will also include some of the tasks associated with implementation planning. The manager will also oversee any contracts in effect during the term of this subcontract.

## **2. Communication, Coordination, and Outreach**

The objective of this work category is to maintain a high level of communication and coordination with CV-SALTS, CVSC, the regulated community, other interested parties, and the Central Valley Water Board. This coordination will include:

- A. Stakeholder Communication and Outreach  
As needed, the manager will be responsible for communication, and outreach and information exchange between LSJR Committee members and other stakeholders.
- B. Coordination with CV-SALTS and CVSC Efforts  
The manager will facilitate coordination between the committee efforts and those of CV-SALTS and CVSC to integrate and resolve technical and policy-related issues.
- C. Regular Updates to CV-SALTS Committees and Central Valley Water Board  
The manager will provide quarterly written updates to the CV-SALTS Executive and Technical Committees and verbal updates, if requested by either Committee. The manager will also provide updates to the Central Valley Water Board, if needed or requested.

## **3. Initiation and Management of Certain Workplan Activities**

There are certain workplan activities, which may have been initiated but not completed at the time the manager's contract takes effect. There are other activities that may not have been initiated at the time the manager's contract takes effect. The objective of this work category is to ensure that all workplan activities progress in a timely manner. Those activities include:

- A. Review of Beneficial Uses (VII)\*
- B. Review and Delineation of Water Quality Criteria (VIII & IX)
- C. Review of Established WQOs for Salinity (X)
- D. Determination of Proposed Water Quality Objectives (XI)
- E. Water Quality Characterization (XIII)
- F. Estimate Baseline Loading (XIV)
- G. Modeling Existing Water Quality/Evaluate Compliance with WQOs (XV & XVI)
- H. Implementation Planning (XVII)
- I. Economic Analysis (XX)
- J. Preparation of Proposed Monitoring Program (XI)
- K. Preparation of Proposed Basin Plan Amendment Language (XXII)
- L. Prepare CEQA Documentation/SED (XXIII)

\* The roman numerals in parentheses behind each activity refer to the numbering of the activities as found in the workplan flow table (Attachment 2) and the workplan breakdown table (Attachment 3)

The manager will be responsible for initiating and/or managing these activities. Some of the tasks identified in the workplan for these activities are behind the schedule identified in the workplan. The manager will be responsible for advancing the activities as quickly as possible and for meeting the schedule as closely as possible.

#### **4. Completion of Certain Workplan Activities**

The committee may identify certain other workplan activities that will be assigned to the manager for completion. Some of these are identified in Attachment 3, but others may be added by the committee as they become known.

##### **Schedule**

The schedule for the individual activities and tasks identified in this scope of work is imbedded in the preliminary draft workplan schedule, which is contained in the activity project table (Attachment 2).

##### **Funding Allocated**

Not to exceed \$300,000.

ATTACHMENT 1

Preliminary Draft Workplan

DRAFT

ATTACHMENT 2

Preliminary Draft Workplan Flow Table

DRAFT

ATTACHMENT 3

Preliminary Draft Workplan Breakdown Table

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## **Preliminary Draft Work Plan for Development of Water Quality Objectives for Salinity on the Lower San Joaquin River**

**NOTE: Presented here is a description of the various steps needed to complete a basin plan amendment. The write up implies that each will be completed in detail. In reality, the starting point for many tasks will simply be updating present information. There are many existing reports and evaluations of salinity on the Lower San Joaquin River. It is not the intent of this description to imply that the LSJR Committee will start over with a large study. Tough choices will have to be made on how we update present data within the resources and time available. Each work step description needs to be evaluated on how best to accomplish it. Please read with this qualifier or caveat.**

### **Introduction**

The Work Plan provided below is the Lower San Joaquin River (LSJR) Committee's, a stakeholder group of the Central Valley Salinity Alternatives for Long-Term Sustainability (CV-SALTS), suggestions as to how to complete a Basin Plan Amendment for establishing salinity water quality objectives on the Lower San Joaquin River from Merced River inflow to Vernalis. The Work Plan lays out a technical and administrative process to evaluate and define the beneficial uses of this river reach and to recommend water quality objectives for salinity and the individual salt constituents that make up the salinity levels. New or modified beneficial uses and water quality objectives must be adopted by the Regional Water Board in a Basin Plan amendment. The process described in the Work Plan will provide the Regional Water Board with the necessary tools to develop and adopt a Basin Plan Amendment that was prepared in accordance with the requirements of the Water Code. The Water Code requires consideration of various factors, including the means by which the objectives can be attained, economics, the need for housing and other factors spelled out in the Water Code. The Work Plan includes the development of an implementation plan to demonstrate the means by which proposed objectives will be achieved and the cost of doing so. The Work Plan also will develop other information needed to fulfill Water Code requirements. This Work Plan is set up to provide the Regional Water Board with the necessary tools to adopt water quality objectives by the deadline specified by the State Water Board's Recycled Water Policy which calls for development of a salt management plan for all the regions of the State by end of 2014.

This Work Plan will be continuously updated and will evolve as more information is known, but will establish the framework and timing of needs to demonstrate adequate progress by the stakeholders in developing the basis for a Basin Plan Amendment. All of the efforts described in this Work Plan will make efficient use of existing data and information from all sources with the goal of minimizing duplication of past efforts. All efforts of the LSJR Committee will be coordinated with other regulatory processes, anti-degradation efforts, salt management efforts, Delta requirements and others. The Work Plan describes a process that is transparent and open to all stakeholders and the public.

### **Goals of the LSJR Committee in Developing Salinity Objectives**

In the development of the Work Plan, the LSJR Committee discussed the following goals for the program of establishing water quality objectives for the Lower San Joaquin River:

1. Maximum protection of existing beneficial uses;
2. Maintain the capability to increase the level of beneficial use of the Lower San Joaquin River;
3. Set up a comprehensive plan to achieve salt balance in the river basin which is inclusive of all current and developing water uses and economic interests;
4. Establish water quality objectives and implementation mechanisms that not only protect beneficial uses in the Lower San Joaquin River basin but also downstream;
5. Develop objectives and implementation based on sound science;
6. Identify feasible plans for funding the implementation alternatives, projects and follow-up needed to demonstrate success;
7. Develop broad public understanding and ownership of the salt management plan within the Lower San Joaquin River Basin and beyond in the Central Valley;
8. Provide regulatory certainty to encourage capital investment and long-range planning that provides adaptability and flexibility; and
9. Use common language, understanding and decision tools.

The following is a brief description of each work plan element as laid out in the attached timeline spreadsheet.



## Work Plan Development

### **(Line 5): Prepare Initial Draft or Outline of LSJR Committee Work Plan**

*Identify and conduct preliminary scoping of tasks needed to develop a Basin Plan Amendment for water quality objectives for salinity on the Lower San Joaquin River and put into an outline framework. The outline should include management plan goals, task descriptions, and where possible, identification of leads, schedules and budgets.*

### **(Line 6): Identify Critical Tasks and Prepare Detailed Descriptions**

*Prepare a description of critical pathways to work plan implementation and completion along with milestones. All should be identified in the work plan and timeline.*

### **(Line 7): Schedule Critical Pathways and Milestones**

*Critical pathways to work plan implementation and key milestones should be identified in the work plan. Work management should focus on ensuring critical pathways and key milestones are noted and stay on schedule. Identify tasks, which must proceed immediately (i.e. due to critical path or length of effort) and be sure these are noted for completion.*

### **(Line 8): Conduct Internal LSJR Committee Review of Work Plan**

*Ensure review by all LSJR committee members and that there is an understanding of the complexity of certain tasks.*

### **(Line 9): Finalize Draft Work Plan**

*Prior to moving forward, complete the draft work plan with all the timelines clearly identified. Be sure that all committee members have had input into the final draft of the work plan.*

### **(Line 10): Review of Work Plan by CV-SALTS, Exec Committee, CV-SALTS Coalition and Regional Water Board Staff**

*The draft work plan needs to be reviewed and approved by the by CV-SALTS Exec Committee, CVC-SALTS Technical Committee, CV-SALTS Coalition and Regional Water Board staff to ensure that they are comfortable with the critical tasks to be undertaken by the LSJR Committee and time lines that are proposed. This work plan must act as an agreement between the stakeholders and the CV-SALTS/ Regional Water Board staff.*

### **(Line 11): Respond to Comments**

*The LSJR Committee needs to be able to respond to any comments for improvements to the work plan provided by the reviewers. In those areas where agreement cannot be found and a response to comments prepared, there needs to be intervention on the part of the by CV-SALTS, Exec Committee or the CV-SALTS Coalition to resolve the differences. In the event that major additional work is required, the LSJR Committee will need to determine the impact on the remainder of the work plan or the need to prepare an alternate work plan.*

### **(Line 12): Finalize LSJR Committee Work Plan**

*Based on the comments received from the CV-SALTS Executive Committee, the CV-SALTS Technical Committee, CV-SALTS Coalition, and Regional Water Board staff, the LSJR Committee will attempt to modify the Work Plan to accommodate the comments. In those instances where accommodation cannot be made, it will be noted as a point of contention and reviewed at a later date.*

## Budget/Funding/Financing

### **(Line 14): Develop Cost Estimates for Each Work Plan Task**

*Prepare a detailed estimate of cost for each item in the work plan, including financial and in-kind resource requirements from any and all parties. Review expenditures and refine and update costs and budgeting on a regular basis (half yearly and annual).*

**(Line 15): Prepare a Detailed Revenue and Funding Plan**

*Prepare a detailed plan for obtaining stakeholder, grant, and other funding and financing resources needed over the duration of the budgeted activities for all elements of the program.*

**(Line 16): Identify Non-Financial Resources and Inputs**

*Identify non-financial in-kind and stakeholder contributed studies and opportunities to have others contribute in non-financial ways. Additionally prepare a section specifically to meet the needs of the Regional Water Board and basin plan amendment needs for this program.*

**(Line 17): Develop the Program Organization and Governance**

*Develop an organizational chart and contact list for the LSJR Committee effort. Develop clear lines of leadership responsibilities, including project, funding, and technical oversight. Develop a process for determination of leadership and roles and responsibilities of work groups and subcommittees. Determine and implement a management structure for oversight of the work plan and Basin Plan Amendment development. Develop methods and structures for managing contractors. The LSJR Committee will also document any contractual or other relationships to members of the LSJR Committee, the CV-SALTS Executive and Technical Committees and the CV-SALTS Coalition.*

**(Line 18): Develop Procedures for Procurement of Needed Services and Financial Administration**

*Develop and implement a process for oversight of procurement of services in conjunction with the CV-SALTS Executive Committee and the CV-SALTS Coalition. This should include procedures for development of scopes of work, identification of contractors, solicitation and evaluation of proposal, and bids, as well as contracting for the work to be performed and ensuring the project contractors or other services are completed and paid. Develop procedures for administration of funds and grants consistent with procedures prepared by the CV-SALTS Executive Committee. Where needed, oversee procurement of goods and services. If needed, develop and implement accounting procedures. Produce quarterly financial reports for work plan.*

**Stakeholder Involvement and Outreach**

**(Line 20): Develop Procedures for Stakeholder Coordination and Management**

*Planning, managing and coordinating the LSJR Committee meetings and interactions with current and future stakeholders.*

**(Line 21): Outreach and Public Information**

*Announce and initiate all LSJR Committee meetings as public meetings. Where needed, sponsor public workshops to update stakeholders on the LSJR Committee progress. Work through the CV-SALTS Executive Committee and the Public Education and Outreach Committee to ensure adequate notice is provided of the LSJR Committee activities.*

**(Line 22): Periodic Reporting and Communications**

*Coordinate with the Public Education and Stakeholder Outreach Committee to provide appropriate information on the salinity water quality objective development process being used by the LSJR Committee to the audiences of the program on a timely and appropriate basis. Prepare official reports to the CV-SALTS Executive Committee, the Regional Water Board, and all funding agencies and groups, as appropriate. Prepare and present updates to the CV-SALTS Executive Committee, the Regional Water Board and others, as needed.*

**(Line 23-25): Record Keeping**

Work with Water Board staff to identify record keeping needs for the Basin Plan Amendment and other process requirements. Develop guidelines on needed records, a filing system, and a records retention schedule. Ensure that the appropriate records are retained and filed accordingly.

### **Basin Description**

**(Line 27): Prepare Outline for a Draft Basin Description**

*Prepare an outline of the necessary components and sections of an adequate Basin Description. This Basin Description will utilize a number of documents that have already been reviewed and printed and will rely heavily on previous written versions of descriptions of the physical features of the San Joaquin River basin and how these influence salinity buildup in the basin. The Basin Description outline will concentrate on the physical features of the San Joaquin River basin that influence salinity buildup that would help better define watersheds to be considered. The analysis will concentrate on how various watersheds impact salinity and will only move into other factors if they affect salinity buildup.*

**(Line 28): Conduct Brief Internal (LSJR Committee) Review of Draft Outline**

*The LSJR Committee will review and accept the outline and identify sources of information that can be used to complete the document.*

**(Line 29-30): Prepare Initial Draft of Basin Description**

*The LSJR Committee will coordinate the development of the initial draft of the Basin Description utilizing documents such as Regional Water Board historical documents, Vernalis TMDL report, McCarthy report, Sacramento-San Joaquin River Basin Plan, San Joaquin River Restoration Program technical documents and other historical documents as the LSJR Committee feels necessary. The emphasis of this basin description analysis will be on the physical description of the basin and the needed watershed descriptions or delineations that will be needed for further analysis in the future.*

**(Line 31): Conduct Internal (LSJR Committee) Review of the Basin Description Draft**

*The LSJR Committee will conduct or arrange for a review of the initial draft of the Basin Description. Based on comments received from the LSJR Committee members, the documents will be put into a final draft form.*

**(Line 32): Review of Basin Description by CV-SALTS Technical Committee, CV-SALTS Coalition and Regional Water Board Staff**

*The LSJR Committee will request a review of the final draft Basin Description by the CV-SALTS Technical Committee, CV-SALTS Coalition and Regional Water Board staff.*

**(Line 33): Respond to Comments**

*The LSJR Committee will consider the comments received from the reviewers and, where needed, will modify the Basin Description. If time permits, the LSJR Committee will respond to those comments not considered in the final drafting.*

**(Line 34): Finalize Basin Description**

*The LSJR Committee will prepare a final draft of the Basin Description for distribution to the stakeholders and public. The actual release of the final draft document will be determined by the LSJR Committee and the public workshop and meeting schedules agreed upon by the LSJR Committee.*

**(Line 35): Prepare Draft Changes to Basin Plan Language Involving the Basin Description**

*The LSJR Committee will prepare a final draft of the Basin Description and with the final wording, prepare draft changes to the Basin Plan Language involving the basin description.*

### **Historical Water Use and Salinity Buildup in the Basin**

**(Line 37): Prepare Outline for a Draft Description of the Basin History**

*Prepare an outline of the necessary components and sections of an adequate description of how salinity developed in the basin and the main factors influencing that buildup. This Basin historical write-up will utilize a number of documents that have already been reviewed and printed and will rely heavily on previous written versions of descriptions of water supply development and land use and how these influence salinity buildup in the basin. The historical buildup outline will concentrate on water supply challenges and salinity buildup that would help better define salinity or how water supply development and land use contributed to salinity development in the basin. The analysis will concentrate on how salinity developed in the various watersheds within the LSJR Basin and will only move into other factors if they affect salinity buildup.*

**(Line 38): Conduct Brief Internal (LSJR Committee) Review of Draft Outline Description of the Basin History**

*The LSJR Committee will review and accept the outline and identify sources of information that can be used to complete the document.*

**(Line 39): Prepare Initial Draft Description of Basin History**

*The LSJR Committee will coordinate the development of the initial draft of historical water use and salinity buildup in the San Joaquin River Basin utilizing documents such as Regional Water Board historical documents, Vernalis TMDL report, McCarthy report, Sacramento-San Joaquin River Basin Plan, San Joaquin River Restoration Program technical documents and other historical documents as the Committee feels necessary. The emphasis of this write up on the historical salinity buildup will be on the factors in development and water supply and land use that influenced salinity buildup and discharge to the San Joaquin River or delineations that will be needed for further analysis in the future.*

**(Line 40): Conduct Internal (LSJR Committee) Review of Draft Basin History**

*The LSJR Committee will conduct or arrange for a review of the initial draft of the historical water use and salinity buildup description. Based on comments received from the Committee members, the documents will be put into a final draft form.*

**(Line 41): Review of Draft Basin History by CV-SALTS Technical Committee, CV-SALTS Coalition and Regional Water Board Staff**

*The LSJR Committee will request a review of the final draft of the historical water use and salinity buildup description by the CV-SALTS Technical Committee, CV-SALTS Coalition and Regional Water Board staff.*

**(Line 42): Respond to Comments**

*The LSJR Committee will consider the comments received from the reviewers and, where needed, will modify the Basin Description. If time permits, the LSJR Committee will respond to those comments not considered in the final drafting.*

**(Line 43-44): Finalize the Description of Basin History**

*The LSJR Committee will prepare a final draft of the Basin History for distribution to the stakeholders and public. The documents to be utilized in the final document will include, but not be limited to, Regional Water Board historical documents, Vernalis TMDL report, McCarthy report, Sacramento-San Joaquin River Basin Plan, San Joaquin River Restoration Program technical documents and other documents as needed. The actual release of the final draft document will be determined by the LSJR Committee and the public workshop and meeting schedules agreed upon by the LSJR Committee.*

**Problem Statement**

**(Line 46): Prepare Initial Draft of a Problem Statement Basin Plan Amendment Language**

*Based upon the reports prepared by the LSJR Committee describing the watersheds in the basin (Basin Description) and the historical buildup of salinity, the LSJR Committee will prepare an initial draft of a Problem Statement that can be used for future Basin Plan language.*

**(Line 47): Conduct Internal (LSJR Committee) Review of the Draft Language**

*The LSJR Committee will conduct or arrange for a review of the draft problem statement for basin plan language. Based on comments received from the Committee members, the Problem Statement will be put into a final draft form.*

**(Line 48): Prepare Draft Changes to Basin Plan Language Involving the Problem Description**

*The LSJR Committee will prepare a final draft of the Basin Plan language describing the salinity buildup problem and the need for water quality objectives for future protection of established beneficial uses.*

**Review of Lower San Joaquin River Beneficial Uses**

**(Line 50): Select Proposed Beneficial Use Designations**

*The LSJR Committee will evaluate the existing list of beneficial use definitions outlined in the Sacramento-San Joaquin River Water Quality Control Plan and listings from other sources and decide upon a final list of beneficial use definitions to be used in the review of beneficial uses for the Lower San Joaquin River Basin. This will be the initial listing but the final listing may change as further review of beneficial uses proceeds.*

**(Line 51-58): Assignments for Review of Documentation Describing Existing Beneficial Uses**

*The LSJR Committee will assign document review to individual members or outside experts to review the present and potential beneficial uses that may exist on the Lower San Joaquin River. Review of documents will include, but not be limited to, the Phase 1 (Kennedy/Jenks) Beneficial Uses and Objectives Study, State Water Board WQ 85-1 Report, Regional Water Board Draft Report entitled McCarthy Report, Sacramento-San Joaquin River Basin Plan, Grassland BU Assessment, the Vernalis TMDL Report and other reports, as deemed needed.*

**(Line 59): Review Policy Decisions of CV-SALTS Executive Committee/DPH and others**

*The LSJR Committee will conduct a review of existing policies within the basin plans, policy development decisions of the CV-SALTS Executive Committee, the California Department of Health Services or other policies of State and federal agencies that may impact the development of, or designation of beneficial uses on the Lower San Joaquin River.*

**(Line 60): Review Beneficial Use Designation Policy from US EPA/State Water Board/Regional Water Board and Factors Required by the Water Code and Clean Water Act**

*The LSJR Committee will undertake a review of beneficial use designation policy from US EPA/State Water Board/Regional Water Board and other factors required by the Water Code and/or the Clean Water Act that may impact the designations of beneficial uses on the Lower San Joaquin River.*

**(Line 61): Describe and Document Existing Beneficial Uses for the LSJR**

*From existing documentation, the LSJR Committee will oversee the development of a listing of present and potential beneficial uses on the Lower San Joaquin River. This listing will serve as an initial listing for development of appropriate basin plan amendment language. A full listing of references will accompany this effort and be part of the documentation needed for the basin plan amendment.*

**(Line 62): Prepare Draft Basin Plan Language for Proposed Changes to Designated Beneficial Uses**

*Draft language for proposed changes to designated beneficial uses in the Basin Plan will be prepared for consideration by the LSJR Committee.*

**(Line 63): Conduct Internal (LSJR Committee) Review of Draft Language**

*The LSJR Committee will conduct or arrange for a review of the draft language for beneficial use designations that will be considered for basin plan language. Based on comments received from the Committee members and other participating in the review, the documents will be put into a final draft form.*

**(Line 64): Review of Draft Beneficial Use Language by CV-SALTS Technical Committee, CV-SALTS Coalition and Regional Water Board Staff**

*The LSJR Committee will request a review of the final draft of the basin plan language for beneficial use designations by the CV-SALTS Technical Committee, CV-SALTS Coalition and Regional Water Board staff.*

**(Line 65): Respond to Comments**

The LSJR Committee will consider the comments received from the reviewers and, where needed, will modify the proposed changes to the Beneficial Use Designations in the Basin Plan. If time permits, the LSJR Committee will respond to those comments not considered in the final drafting.

**(Line 66): Finalize Draft Basin Plan Language for Proposed Changes to Designated Beneficial Uses**

The LSJR Committee will prepare a final draft of the changes proposed to the designations of beneficial uses for distribution to the stakeholders and public. The actual release of the final draft document will be determined by the LSJR Committee and the public workshop and meeting schedules agreed upon by the LSJR Committee.

**Review of Water Quality Criteria**

**(Line 68): Identify Constituents of Concern (EC, TDS, Boron, Specific Salts, Etc.)**

The LSJR Committee will review or arrange for a review of which constituents of concern in salinity including, but not limited to, EC, TDS, B, Ca, Na, Mg, SO<sub>4</sub>, Cl, HCO<sub>3</sub> and CO<sub>3</sub>, should be considered by the LSJR Committee. A listing of those of concern and the reason for their consideration will be prepared.

**(Line 69-73): Review of Applicable Drinking Water Salinity Criteria**

The LSJR Committee will review or arrange for a review of drinking water quality criteria established at either the State, federal or local levels. The review will include, but not limited to the Phase 1 Beneficial Uses and Objectives Study, Review of DHS Drinking Water Quality Criteria and Regulations, review of US EPA Drinking Water Quality Criteria and Regulations, and review of Regional Water Board Drinking Water Policy documentation efforts.

**(Line 74-79): Review of Aquatic Life Salinity Criteria**

The LSJR Committee will review or arrange for a review of aquatic life water quality criteria established at either the State, federal or local levels for salinity levels. The review will include, but not limited to the Phase 1 Beneficial Uses and Objectives Study, review of scientific literature for aquatic life uses, review of US EPA Guidelines for aquatic life protection, and review of Regional Water Board documentation on aquatic life criteria. Where the documentation is inadequate, the LSJR Committee will prepare a Scope of Work for further review of aquatic life water quality criteria and work with the CV-SALTS Technical Committee on procurement of services to fulfill this data need.

**(Line 80-84): Wetlands Water Use Salinity Criteria**

The LSJR Committee will review or arrange for a review of wetland water use water quality criteria established at either the State, federal or local levels for salinity levels. The review will include, but not limited to the Phase 1 Beneficial Uses and Objectives Study, review of scientific literature for wetland water use, review of US EPA Guidelines for wetlands protection, and review of Regional Water Board documentation on wetland water use criteria. Where the documentation is inadequate, the LSJR Committee will prepare a Scope of Work for further review of wetland water use water quality criteria and work with the CV-SALTS Technical Committee on procurement of services to fulfill this data need.

**(Line 85-90): Agricultural Salinity - Stock Watering**

The LSJR Committee will review or arrange for a review of animal drinking water quality criteria established at either the State, federal or local levels for salinity levels. The review will include, but not limited to the Phase 1 Beneficial Uses and Objectives Study, review of scientific literature for animal drinking water use, review of US EPA Guidelines for animal drinking water quality protection, and review of Regional Water Board documentation on animal drinking water use criteria. Where the documentation is inadequate, the LSJR Committee will prepare a Scope of Work for further review of the animal drinking water use water quality criteria and work with the CV-SALTS Technical Committee on procurement of services to fulfill this data need.

**(Line 91-98): Agricultural Salinity - Irrigation Uses**

The LSJR Committee will review or arrange for a review of irrigation water quality criteria established at either the State, federal or local levels for salinity levels, including the Hoffman Report being used for the Southern Delta salinity standard review. The review conducted here will include, but not limited to the following steps; review the completeness of Regional Water Board staff report on Irrigation Uses in the Lower San Joaquin River Basin, review and prioritize comments on the Regional Water Board staff report on Irrigation Uses in the Lower San Joaquin River Basin, determine whether comments on the Regional Water Board staff report are policy or technical, determine whether comments can be handled by LSJR Committee or whether the CV-SALTS Executive and/or Technical Committees need to undertake a review and prepare comments or whether the LSJR Committee needs to contract for this work to be completed in a scientific manner, and if needed, prepare a Scope of Work for completion of the Regional Water Board staff report on Irrigation Uses in the Lower San Joaquin River Basin. Should it be determined that an outside expert is needed for the review of the draft Regional Water Board staff report on Irrigation Uses in the Lower San Joaquin River Basin, the LSJR Committee will assist in contracting for completion of the Regional Water Board staff report on Irrigation Uses in the Lower San Joaquin River Basin and review and finalized the Irrigation Use Study for use by the LSJR Committee.

### **Delineation of Water Quality Criteria**

**(Line 100): Prepare Initial Draft of Water Quality Criteria to be Considered for the Various Beneficial Uses in the LSJR**

*The LSJR Committee will, based upon the review of salinity water quality criteria for the various beneficial uses, prepare an initial listing of the significant salinity criteria for the various beneficial uses defined for the Lower San Joaquin River. This initial listing will serve as a resource and reference document for establishment of water quality objectives for salinity. The LSJR Committee will also ensure that the documentation to support the list is available as a reference document for any basin plan amendment changes proposed.*

**(Line 101): Conduct Internal (LSJR Committee) Review of Draft Water Quality Criteria**

*The LSJR Committee will conduct or arrange for a review of the initial draft of the water quality criteria for each designated beneficial use. Based on comments received from the Committee members, the documents will be put into a final draft form.*

**(Line 102): Review of Draft Water Quality Criteria by the CV-SALTS Technical Committee, CV-SALTS Coalition and Regional Water Board Staff**

*The LSJR Committee will request a review of the final draft water quality criteria by the CV-SALTS Technical Committee, CV-SALTS Coalition and Regional Water Board staff.*

**(Line 103): Respond to Comments**

*The LSJR Committee will consider the comments received from the reviewers and, where needed, will modify the water quality criteria and prepare the scientific basis for the modifications. The LSJR Committee will also ensure that the documentation to support the changes to the water quality criteria based on comments from the reviewers is available as a reference document for any basin plan amendment changes proposed. If time permits, the LSJR Committee will respond to those comments not considered in preparing the final draft water quality criteria.*

**(Line 104): Finalize Water Quality Criteria to be Used for Developing Water Quality Objectives**

*The LSJR Committee will prepare a final draft of the water quality criteria that will be used to consider ranges of water quality objectives. The LSJR Committee will ensure that the water quality criteria documents and reference material is available for distribution to the stakeholders and public. The actual release of the final draft document will be determined by the LSJR Committee and the public workshop and meeting schedules agreed upon by the LSJR Committee.*

### **Review of Established Water Quality Objectives for Salinity**

**(Line 106): Review State Board Documents on Southern Delta Salinity Objectives**

*The LSJR Committee will review and analyze the technical support documents prepared as part of the Southern Delta Salinity objective setting process. The documents will include, at a minimum, the Hoffman Report and the Technical*

Appendixes to the Substitute Environmental Document and the Substitute Environmental Document. In addition, the LSJR Committee will need to review the proposed water quality objectives and the basis for the recommendations.

**(Line 107) Review the Proposed Water Quality Objectives for Salinity in the Southern Delta**

The LSJR Committee will need to review and analyze the basis for the establishment of water quality objectives for salinity in the Southern Delta and how this objective will impact the actions upstream in the Lower San Joaquin River. Present State Water Board direction to the LSJR Committee is to reduce salt input to the Lower San Joaquin River by 10% from the 1990 levels and move the export of salt from the basin to higher flow periods. The latest objective setting process will need to be evaluated as to whether this can be accomplished and what level of protection will be needed upstream in order to accomplish the State Water Board direction.

**(Line 108): Review Salinity Water Quality Objectives Established in other Water Bodies**

The LSJR Committee will undertake or will schedule a review of other salinity objectives established in surface water bodies and the beneficial uses they are intended to protect. The review will first cover the surface water bodies of the State of California and then will look at objectives established in other states. Documentation on the reasoning and scientific basis for the objectives will be developed and made available to the LSJR Committee and become part of the record of the basin plan amendment.

### Water Quality Objectives

**(Line 110): Review Policy Decisions of CV-SALTS Executive Committee**

The CV-SALTS Executive Committee is considering several policy issues related to establishment of water quality objectives for salinity. The LSJR Committee will need to consider whether this policy guidance is appropriate for the development of water quality objectives for salinity in the Lower San Joaquin River Basin.

**(Line 111-116): Evaluate a Range of Water Quality Objectives for Salinity**

The LSJR Committee will evaluate and prepare a range of water quality objectives to be analyzed based upon the water quality criteria documents previously prepared. A range of water quality objectives will be recommended for Drinking Water, Animal Drinking Water, Protection of Wetland Water Uses, Aquatic Life Protection and for Agricultural Irrigation Uses and an evaluation of the most sensitive ranges within each beneficial use will be conducted. Consideration will also be given to evaluating the impact to beneficial uses of other ranges of water quality objectives.

**(Line 117-124): Review Policy Guidance and Compliance with Policy Guidance**

The LSJR Committee will evaluate policy guidance and compliance with existing regulations from State, federal and local levels in relationship to the range of water quality objectives being proposed for analysis for each beneficial use. The evaluation will, as a minimum, review compliance with the Sources of Drinking Water Policy, State and federal drinking water regulations and other state mandates regarding drinking water, State and federal mandates and policy regarding animal drinking water, State and federal mandates and policy regarding protection of wetlands and wetland water supplies, State and federal mandates and policy regarding aquatic life protection, and State and federal mandates and policy regarding agricultural irrigation uses. This review will also consider compliance with the State and federal Non-Degradation Policy.

**(Line 125-126): Finalize a Set or Range of Water Quality Objectives for Further Analysis**

The LSJR Committee will develop a final set or range of water quality objectives for further analysis. This evaluation will consider and utilize factors defined in Water Code Section 13241 and other applicable regulations.

**(Line 127): Review of Proposed Water Quality Objectives by the CV-SALTS Technical Committee, CV-SALTS Coalition and Regional Water Board Staff**

The LSJR Committee will request a review of the final draft set or range of water quality objectives that will be subjected to further analysis. A review will be requested of the CV-SALTS Executive Committee, the CV-SALTS Technical Committee, CV-SALTS Coalition and Regional Water Board staff.



**(Line 128): Respond to Comments**

*The LSJR Committee will consider the comments received from the review by the CV-SALTS Executive Committee, the CV-SALTS Technical Committee, CV-SALTS Coalition and Regional Water Board staff and, where needed, will modify the range of water quality objectives that will be subjected to further analysis and prepare the basis for the modifications. The LSJR Committee will also ensure that the documentation to support changes to the range of water quality objectives to be subjected to further analysis as proposed by the reviewers is available as a reference document for any basin plan amendment changes proposed. If time permits, the LSJR Committee will respond to those comments not considered in preparing the final draft water quality criteria.*

**(Line 129): Finalize Water Quality Objectives for Further Analysis**

*The LSJR Committee will prepare a final draft of a range of water quality objectives that will be subjected to further analysis. The LSJR Committee will ensure that the documents and reference material supporting the range of water quality objectives that will be subjected to further analysis is available for distribution to the stakeholders and public. The actual release of the final draft document will be determined by the LSJR Committee and the public workshop and meeting schedules agreed upon by the LSJR Committee.*

**Workshop on Beneficial Uses and Water Quality Objectives**

**(Line 131-136): Conduct Workshops on Proposed Beneficial Uses and Water Quality Objectives**

*The LSJR Committee will conduct or facilitate the effort to conduct one or more public workshops on the proposed changes to beneficial uses and water quality objectives for salinity in the Lower San Joaquin River. These workshops will be open to the public and will seek input on any proposed changes to the Beneficial Uses listed for the Lower San Joaquin River in the Sacramento-San Joaquin River Water Quality Control Plan, seek input on any additions to the listed beneficial uses, seek additional input on other beneficial uses that should be considered for inclusion, review the range of water quality criteria found during the Committee's evaluation of the science related to salinity and beneficial use protection, review the range of water quality objectives for salinity that will be evaluated further or considered during this basin plan amendment process, review compliance with State and federal policies and seek additional ideas on water quality objectives for salinity and their effectiveness in protecting designated beneficial uses.*

**Water Quality Characterization**

**(Line 138-141): Identify Watersheds for Analysis**

*Using the Basin Description developed as part of this basin plan amendment analysis, efforts will be made to identify the specific watersheds to be analyzed for salinity input to the Lower San Joaquin River. These watersheds will be used at a later time to determine loadings of salt, existing water quality and potential for improving salinity levels in the Lower San Joaquin River. This analysis will include, but not be limited to, an evaluation of the existing watersheds described in the Basin Plan, watershed as defined in the Vernalis TMDL (Salt and Boron) report, and the utility of using the watersheds described in the draft McCarthy Report. This effort will result in a description of watersheds to be utilized for the salinity inputs analysis.*

**(Line 142-148): Identify Water Supply and Water Use in Each Watershed**

*Using the watersheds identified as part of this basin plan amendment analysis, efforts will be made to quantify the water supply source and water use patterns in each of the identified watersheds. This analysis will include, but not be limited to, characterizing all significant existing uses, flow, location, quality, etc., characterizing legal, institutional and physical/operational constraints to current and future water uses, develop initial future water use scenarios for beneficial uses evaluation, identify locations and magnitude of diversions and other uses, identify drainages and other discharge sources and identify gaining and losing reaches along each of the streams entering the Lower San Joaquin River and the Lower San Joaquin River itself. This analysis will use as a baseline the Vernalis TMDL (Salt and Boron) report and will focus on updating that information.*

**(Line 149-155): Identify Salt Loading Data Available for Selected Watersheds**

For the watershed identified for analysis, the LSJR Committee will initiate or facilitate the development of salt loading data. This analysis will use as a baseline the Vernalis TMDL (Salt and Boron) report and will focus on updating that information. In developing the detailed work steps for this analysis, the LSJR Committee will consider, but not limited to, identifying monitoring points for salt loadings and data sources associated with them or from additional sources, the ability to utilize existing data from the Vernalis TMDL (Salt and boron) report, ability to update data using recent data from the same sources used for the Vernalis TMDL (Salt and Boron) report, USBR Westside Study, studies updating the information from the wetlands and irrigated lands within the Grassland Basin, the impacts of further development of the San Joaquin River Restoration Program and the present levels and future projections of groundwater accretions. The data within the draft McCarthy Report will also be considered.

**(Line 156-160): Update Water Quality Data Base to Current Conditions**

After review of the available reports, the LSJR Committee will undertake or facilitate the updating of present water quality data bases to current conditions. This effort will include, but not be limited to, identifying the usefulness of data used in the Vernalis TMDL (Salt and boron) report, the process and needs to update data using recent data from the same sources used for the Vernalis TMDL (Salt and boron) report or other sources, identify other sources of critical and current water quality data for salinity and determine the effort needed to bring these data bases together.

**(Line 161-162): Identify Missing Salt Loading Data for the Selected Watersheds**

If salt loading data is identified as missing, the LSJR Committee will undertake or facilitate the Preparation of a Scope of Work for Identifying missing salt loadings from the selected watersheds. This Scope of Work will be prepared in conjunction with the CV-SALTS Technical Committee and with the approval of the CV-SALTS Executive Committee and the Regional Water Board staff working on the CV-SALTS project.

**Estimates of Baseline Salt Loading**

**(Line 164): Identify Tools to be Used for Loading Analysis**

The LSJR Committee will initiate or facilitate the development of tools for developing the salt loading data. These tools may include modeling, spreadsheet analysis or other methods. The exact methods cannot be determined until the missing data and the extent of the data analysis needed is determined.

**(Line 165): Identify Significant Salt Sources**

As part of the salt loading analysis, the LSJR Committee will conduct or facilitate the development of a sensitivity analysis to determine the largest and most important sources of salt to the Lower San Joaquin River. If needed, the LSJR Committee will identify the most significant salt sources or undertake or facilitate the preparation of a Scope of Work for identifying the most important salt sources to the Lower San Joaquin River or from selected watersheds. This Scope of Work will be prepared in conjunction with the CV-SALTS Technical Committee and with the approval of the CV-SALTS Executive Committee and the Regional Water Board staff working on the CV-SALTS project.

**(Line 166): Quantify Salt Loads from Various Sources**

As part of the salt loading analysis, the LSJR Committee will conduct or facilitate the development of a salt loading evaluation from the largest and most important sources of salt to the Lower San Joaquin River. If needed, the LSJR Committee undertakes or facilitates the Preparation of a Scope of Work for quantifying the most important salt sources to the Lower San Joaquin River or the most important sources from selected watersheds. This Scope of Work will be prepared in conjunction with the CV-SALTS Technical Committee and with the approval of the CV-SALTS Executive Committee and the Regional Water Board staff working on the CV-SALTS project.

**(Line 167): Develop Water Balance and/or Salt Budget**

The LSJR Committee will conduct or facilitate the development of a water balance and/or salt loading budget from the largest and most important sources of salt to the Lower San Joaquin River. If needed, the LSJR Committee undertakes or facilitates the preparation of a Scope of Work for quantifying the most important salt sources to the Lower San Joaquin River or the most important sources from selected watersheds. This Scope of Work will be prepared in conjunction with the CV-SALTS Technical Committee and with the approval of the CV-SALTS Executive Committee and the Regional Water Board staff working on the CV-SALTS project.

## Modeling Existing Water Quality

### **(Line 169-171): Review and Select a Water Quality Model to Assessing River Salinity Levels**

*The LSJR Committee will conduct or facilitate the evaluation of water quality models that can be used to determine the extent of compliance with proposed water quality objectives for salinity in the Lower San Joaquin River. The review will include but not be limited to a review of the CalSIMS Model, the SJRIO model or other models available for prediction on river salinity levels. If needed, the LSJR Committee undertakes or facilitates the preparation of a Scope of Work for a review of the available models and selection of a model to assist the LSJR Committee in their work. This Scope of Work will be prepared in conjunction with the CV-SALTS Technical Committee and with the approval of the CV-SALTS Executive Committee and the Regional Water Board staff working on the CV-SALTS project.*

### **(Line 172-176): Evaluate Whether the Salinity Water Quality Database is Current**

*The LSJR Committee will conduct or facilitate the evaluation of whether water quality data for salinity is current and can be utilized in the models being considered for evaluation of the extent of compliance with proposed water quality objectives for salinity in the Lower San Joaquin River. The review will include but not be limited to a review of the data needs for the CalSIMS Model, the SJRIO model or other models available for prediction on river salinity levels. If needed, the LSJR Committee undertakes or facilitates the preparation of a Scope of Work to evaluate whether water quality data for salinity is current and can be utilized in the models being considered for assessment of compliance with proposed water quality objectives for salinity. This Scope of Work will be prepared in conjunction with the CV-SALTS Technical Committee and with the approval of the CV-SALTS Executive Committee and the Regional Water Board staff working on the CV-SALTS project.*

### **(Line 177-179): Conduct Seasonal and Water-year Analysis**

*During the evaluation of compliance with the proposed water quality objectives for salinity, the LSJR Committee will evaluate whether there is a need for seasonal variation or adjustment in the objective based on specific periods of beneficial use or other factors or whether seasonal or other water-year type analysis can be conducted with the present data or models being used. This analysis will include at a minimum, evaluation of whether flows and concentration data are available for various points on the river that can be utilized for seasonal and water-year type analysis, including drought or below-normal water years. If needed, the LSJR Committee undertakes or facilitates the preparation of a Scope of Work to evaluate whether seasonal or water year analysis can be conducted and utilized in the models being considered for evaluation of the extent of compliance with proposed water quality objectives for salinity. This Scope of Work will be prepared in conjunction with the CV-SALTS Technical Committee and with the approval of the CV-SALTS Executive Committee and the Regional Water Board staff working on the CV-SALTS project.*

## Evaluate Compliance with Proposed Objectives

### **(Line 181-182): Evaluate Compliance with Proposed Objectives**

*The LSJR Committee will evaluate or facilitate the evaluation of compliance with the proposed water quality objectives. This evaluation will include, but not be limited to, whether compliance with proposed objectives can be achieved with present water operations and a preliminary evaluation of salt load reductions needed to achieve the proposed water quality objectives. If needed, the LSJR Committee under take or facilitate the preparation of a Scope of Work to evaluate the extent of compliance with proposed water quality objectives for salinity including whether seasonal or water-year type analysis should be considered. This Scope of Work will be prepared in conjunction with the CV-SALTS Technical Committee and with the approval of the CV-SALTS Executive Committee and the Regional Water Board staff working on the CV-SALTS project.*

## Implementation Planning

### **(Line 184): Review of Available Resources in the Basin**

The LSJR Committee will evaluate or facilitate the evaluation of the resources available to describe or understand the actions being taken on salinity control within the Lower San Joaquin River Basin for compliance with the proposed range of water quality objectives. The LSJR Committee or contractor will develop a list of all known and potential salinity control actions, ranging from large regional solutions to best management practices and develop a information on how well suited these actions are controlling salinity inputs to the Lower San Joaquin River. In addition, the contractor will develop a listing of goals and policy and management actions that may be needed to facilitate implementation.

**(Line 185): Review of Implementation Actions for the State Water Board Delta Salinity Objectives**

The LSJR Committee will review and analyze the technical support documents prepared as part of the Southern Delta Salinity objective setting process by the State Water Board. The documents will include, at a minimum, the Technical Appendixes to the Substitute Environmental Document and the Substitute Environmental Document. In addition, the LSJR Committee will need to review the implementation actions described in these documents and the basis for their recommendations.

**(Line 186-199): Review of Implementation Alternatives for the LSJR Basin**

The LSJR Committee will evaluate or facilitate the evaluation of alternatives available for compliance with the proposed range of water quality objectives. This will include the evaluation of a no action alternative, the USBR Westside Study, the USBR Real-Time Management Study, Wetland Studies and action plans, proposed water exchanges and probable water exchanges, BDCP/State Water Board flow and salinity objectives and their methods for compliance, the San Joaquin River Restoration Plan implementation methods and actions, the use of solar ponds, the use of a brine line, the implementation of the Grassland Bypass Project, the implementation of the Rainbow Report, other loading alternatives and other flow-related alternatives. If needed, the LSJR Committee undertakes or facilitates the preparation of a Scope of Work to evaluate feasible alternatives to be considered for use as implementation mechanisms for compliance with proposed water quality objectives for salinity. This Scope of Work will be prepared in conjunction with the CV-SALTS Technical Committee and with the approval of the CV-SALTS Executive Committee and the Regional Water Board staff working on the CV-SALTS project.

**(Line 200-201): Develop a Program of Implementation for Who Does What and When and Anticipated Results**

The LSJR Committee will prepare or facilitate the preparation of a Scope of Work to evaluate feasible alternatives and how those alternatives will be implemented to achieve compliance with proposed water quality objectives for salinity. This evaluation will determine water quality conditions that can be reasonably achieved. This Scope of Work will be prepared in conjunction with the CV-SALTS Technical Committee and with the approval of the CV-SALTS Executive Committee and the Regional Water Board staff working on the CV-SALTS project.

**(Line 202-210): Define Implementation Authority**

The LSJR Committee will evaluate or facilitate the evaluation of the various implementation authorities that are available for compliance with the proposed range of water quality objectives. This will include the evaluation of the water board's authority under the Federal Clean Water Act, the Porter-Cologne Water Quality Control Act, State authority over federal and local projects, water right authority, the NPDES Permit System, stormwater permits, prohibition of discharge or Waste Discharge Requirements, waivers, and non-point source discharge controls or TMDLs. The LSJR Committee will prepare or facilitate the preparation of a Scope of Work to evaluate the board's authority to implement various alternative actions and how this authority will be utilized to implemented actions necessary to achieve compliance with proposed water quality objectives for salinity. This work will develop a white-paper exploring the regulatory tools available in the Lower San Joaquin River watershed that can be applied to salinity control actions and discusses the pros and cons of each. This Scope of Work will be prepared in conjunction with the CV-SALTS Technical Committee and with the approval of the CV-SALTS Executive Committee and the Regional Water Board staff working on the CV-SALTS project.

**(Line 211): Develop Screening Tools to Evaluate Potential Management Alternatives**

The LSJR Committee will develop or facilitate the development of tools to screen or prioritize management alternatives for technical feasibility, economic viability, and ability to implement, based on developed screening criteria. The LSJR Committee will utilize these too to take a comprehensive look at implementation scenarios and estimate their ability to reduce salinity concentrations in the Lower San Joaquin River.

**(Line 212): Identify a Suite of Strategies for the Implementation Program**

The LSJR Committee will develop or facilitate the use of the screening criteria to determined or identify comprehensive implementation scenarios worthy of pursuing in a more detailed analysis. This task will overlap the technical and the

policy areas and should be thoroughly public vetted during workshops on alternatives for implementation. These alternative scenarios should be prepared meet CEQA requirements and be able to define a strategy where maximum benefit programs may result in lower cost and improved salt management in the Lower San Joaquin River.

**(Line 213): Develop a “Strawman” Implementation Plan**

The LSJR Committee will develop or facilitate the development of a Scope of Work to develop a “strawman” implementation plan. This plan should include preliminary actions, schedules, responsible parties, institutional requirements, estimated costs, funding responsibilities and strategies, and contingency plans. This plan would also include policy and regulatory requirements that may be generated from maximum benefit, adaptive management or non-regulatory implementation scenarios. This plan would be used to suggest the range of implementation that may occur during public meetings and give the LSJR Committee a scale of amount of effort that will be needed to complete the implementation process and the basin plan amendment. This Scope of Work will be prepared in conjunction with the CV-SALTS Technical Committee and with the approval of the CV-SALTS Executive Committee and the Regional Water Board staff working on the CV-SALTS project.

**(Line 214): Identify Critical Implementation Components**

During the development of the “strawman” implementation plan, there may be issues that are identified as needing further exploration, such as potential regulatory, legal, funding, or institutional obstacles. The Scope of Work for the “strawman” implementation analysis will include the requirement to prepare a white paper accordingly and use to inform the development of quantified, verifiable adaptive management or max benefit strategies and programs to assist with implementation where incomplete data or uncertain circumstances or effectiveness is present. This Scope of Work will be prepared in conjunction with the CV-SALTS Technical Committee and with the approval of the CV-SALTS Executive Committee and the Regional Water Board staff working on the CV-SALTS project.

**(Line 215): Implementation Effectiveness and Preliminary Cost Analysis**

To support the development of the “strawman” implementation plan and the Basin Plan amendment, a review will be needed of selected programs and strategies for effectiveness and preparation of an initial or preliminary cost benefit with the goal of ensuring that critical areas are prioritized, and that public and private capital is applied in the highest performing and most cost effective way. This need will be included in the Scope of Work that will be prepared in conjunction with the CV-SALTS Technical Committee and with the approval of the CV-SALTS Executive Committee and the Regional Water Board staff working on the CV-SALTS project.

**(Line 216): Comments on the “Strawman” Implementation Plan**

The draft “strawman” implementation plan should be vetted at various stages. The LSJR Committee will ensure that during development of the “strawman” implementation plan that is adequate time and effort given to obtaining public review both at the LSJR Committee level and through the CV-SALTS Technical Committee, the CV-SALTS Executive Committee and the Regional Water Board staff working on the CV-SALTS project. There may also be a need for vetting the “strawman” proposal with various parties, and through a wider public release and public workshops.

**Workshop on Proposed Implementation Alternatives**

**(Line 218-222): Conduct a Workshop on the Various Implementation Alternatives and Actions**

The LSJR Committee will conduct or facilitate the effort to conduct one or more public workshops on the various alternatives being considered for implementation to achieve compliance with the water quality objectives for salinity in the Lower San Joaquin River. These workshops will be open to the public and will seek input on any of the alternatives proposed, the adequacy of the suggested alternatives, review the changes in operations and salt loading that must occur for each objective considered, seek guidance on a range of alternatives, seek guidance on economic or institutional constraints to implementation, review the range of compliance levels in relation to or with State and federal policies, and seek additional ideas on water quality objectives and methods for implementation that provide beneficial use protection.

## Select the Alternatives to be Analyzed

### **(Line 224): Review the Changes in Operations and Salt Loading that Must Occur for Each Objective Considered**

*In selecting the alternatives to be further analyzed, the LSJR Committee will consider changes in the operations of water projects and discharges and the resulting salt loading. This sensitivity analysis and other factors will be used in developing the final listing of alternatives to be given full analysis.*

### **(Line 225): Determine Whether Alternative Falls Within Present Authority**

*In selecting the alternatives to be further analyzed, the LSJR Committee will consider whether the alternative's implementation actions fall within the present authority of the State and Regional Water Boards or whether other agencies will need to be included in the implementation plan. These factors will be used in developing the final listing of alternatives to be given full analysis.*

### **(Line 226): Determine Water Quality Conditions that Can Reasonably be Achieved**

*In selecting the alternatives to be further analyzed, the LSJR Committee will consider whether the alternative's implementation actions can be reasonably achieved and are within the authority of an implementation agency. These factors will be used in developing the final listing of alternatives to be given full analysis.*

### **(Line 227): Outline the Economic Impacts of Each Alternative**

*In selecting the alternatives to be further analyzed, the LSJR Committee will consider whether the alternative's implementation actions are a reasonable enough economic impact that further evaluation is warranted. These factors will be used in developing the final listing of alternatives to be given full analysis.*

### **(Line 228): Determine Compliance with Federal and State Laws**

*In selecting the alternatives to be further analyzed, the LSJR Committee will make an initial evaluation as to whether the alternative's implementation actions are within compliance with State and federal laws and can be implemented within those law and authorities. These factors will be used in developing the final listing of alternatives to be given full analysis.*

### **(Line 229-237): Determine Compliance with Federal and State Policies and Regulations**

*In selecting the alternatives to be further analyzed, the LSJR Committee will make an initial evaluation as to whether the alternative's implementation actions are in compliance with State and federal policies and regulations. Policies and regulations that will be covered in this evaluation will include, but not limited to, the Clean Water Act, State and federal Endangered Species Act, Recycled Water policy, Urban Runoff Policy, Water Quality Limited Segment Policy, both Federal and State Antidegradation Policy, Water Quality Objectives policy and the Watershed Policy. These factors will be used in developing the final listing of alternatives to be given full analysis.*

## Economic Analysis

### **(Line 239-246): Conduct a Full Economic Analysis of the Cost of Implementation of the Selected Alternatives**

*To support the implementation plan and the draft Basin Plan amendment, the LSJR Committee will review the selected programs and strategies for effectiveness and cost benefit with the goal of ensuring that critical areas are prioritized, and that public and private capital is applied in the highest performing and most cost effective way. This evaluation must include anticipated implementation program costs, costs to agriculture and where there are sources of funding for agriculture (per Water Code), costs to municipal dischargers, costs to industrial dischargers, costs to water districts and water supply, costs to wetland management areas and also seek additional input on cost of the alternative water quality objectives.*

## Long-Term Monitoring and Compliance Reporting

### **(Line 248): Set the Goals of Monitoring and Compliance Reporting**

*The LSJR Committee will conduct or facilitate the effort to identify and define the goals of a long-term monitoring and compliance reporting program. Goals may include monitoring for CEQA-requirements, or monitoring to inform adaptive management proposals. If needed, a Scope of Work will be prepared in conjunction with the CV-SALTS Technical Committee and with the approval of the CV-SALTS Executive Committee and the Regional Water Board staff working on the CV-SALTS project to facilitate developing these goals.*

### **(Line 249): Prepare a Program for Monitoring and Compliance**

*The LSJR Committee will conduct or facilitate the effort to prepare a draft long-term monitoring and compliance program. The monitoring and compliance plan may build off of short term monitoring plans prepared and executed by other stakeholders. The Scope of Work for a monitoring plan should identify monitoring locations, constituents, frequency, funding and resource needs and sources, monitoring leads, purpose of monitoring, and means of reporting results. Plan should also include a QAPP. If needed, a Scope of Work will be prepared in conjunction with the CV-SALTS Technical Committee and with the approval of the CV-SALTS Executive Committee and the Regional Water Board staff working on the CV-SALTS project to facilitate developing these goals.*

## Prepare Basin Plan Amendment Language

### **(Line 251): Draft Basin Plan Amendment Preparation**

*The LSJR Committee will prepare or work with Regional Board staff to prepare the draft Basin Plan Amendment according to Regional Water Board requirements. The LSJR Committee will conduct an internal review prior to release for public review and comment. The LSJR Committee will ensure that all the Basin Plan amendment language is prepared under the supervision of Regional Water Board staff. Presentations of the draft language will be made to the CV-SALTS Technical Committee and the CV-SALTS Executive Committee.*

### **(Line 252): Prepare Final Document for Presentation to Regional Board Staff**

*The LSJR Committee will prepare or work with Regional Board staff to prepare the final draft Basin Plan Amendment according to Regional Water Board requirements. The LSJR Committee will receive and respond to public comments. The final draft Basin Plan Amendment language will be prepared according to Regional Water Board requirements. The LSJR Committee will work with the Regional Board staff on the release for public review and comment.*

## Prepare Substitute Environmental Document (SED) and CEQA Documentation

### **(Line 254): Draft CEQA Functional-Equivalent Documentation**

*The LSJR Committee will utilize the scoping efforts previous done by the Regional Water Board staff on the scope of the environmental analysis of the proposed water quality objectives and implementation plan. The LSJR Committee will determine the need to solicit additional information and feedback on the scope of alternatives and the areas for analysis including implementation. The LSJR Committee will conduct or facilitate the preparation of the environmental analysis of the proposed water quality objectives and implementation plan. The LSJR Committee will also determine whether CEQA compliance is for the Basin Plan amendment alone, or whether it should be prepared to cover other implementation actions as well. This task also covers document production and posting requirements and preparation of responses to comments and final environmental documentation. If needed, a Scope of Work will be prepared in conjunction with the CV-SALTS Technical Committee and with the approval of the CV-SALTS Executive Committee and the Regional Water Board staff working on the CV-SALTS project to facilitate the preparation of these documents. The final draft of the Substitute Environmental Document language will be prepared according to Regional Water Board requirements. The LSJR Committee will work with the Regional Board staff on the release for public review and comment.*























**Preliminary Draft Workplan Breakdown**

<b>Work Category</b>	<b>Workplan Activity<sup>1</sup></b>	<b>Responsibility</b>
<b>Administration</b>		
	I. Work Plan Development	Completion by Committee Manager
	II. Budgeting/Funding/Financing	LSJR Committee
	XXIV. LSJR Committee Team Management	Committee Manager
	XXV. Developing SOW, contracting, and contract management	CV-SALTS Technical Manager with input and assistance from Committee Manager
<b>Communication &amp; Outreach</b>		
	III. Stakeholder Involvement & Outreach	Committee Manager
	XII Workshop on Beneficial Uses & WQOs	Initiation/Management by Committee Manager
	Implementation Planning - Workshop on Proposed Implementation Alternatives	Initiation/Management by Committee Manager
	XXVI. Reports to Regional Board & CV-SALTS	Initiation/Management by Interim Committee Manager
<b>Basin Planning</b>		
	IV. Basin Description	Completion by Interim Committee Manager
	V. Historical Water Use & Salinity Buildup	Completion by Interim Committee Manager
	VI. Problem Statement	Completion by Interim Committee Manager
	VII. Review of SJR Beneficial Uses	Initiation/Management by Interim Committee Manager
	VIII. Review of Water Quality Criteria	Initiation/Management by Interim Committee Manager
	Drinking Water	Completion by Interim Committee Manager
	Aquatic Life	Initiation/Management by Interim Committee Manager
	Wetlands	Initiation/Management by Interim Committee Manager
	Ag -Stock Watering	Kennedy-Jenks (contract)
	Ag - Irrigation Use	Initiation/Management by Interim Committee Manager
	IX. Delineation of Water Quality Criteria	Initiation/Management by Interim Committee Manager
	X. Review of Established WQOs for Salinity	Initiation/Management by Interim Committee Manager

	XI. Water Quality Objectives	Initiation/Management by Interim Committee Manager
	XX. Economic Analysis	Initiation/Management by Long-term Committee Manager
	XXIII. Prepare SED/CEQA Documentation	Initiation/Management by Long-term Committee Manager
	XXI. Monitoring & Compliance	Initiation/Management by Long-term Committee Manager
	XXII. Prepare BP Language	Initiation/Management by Long-term Committee Manager
	Legal/Regulatory Review	Initiation/Management by Interim Committee Manager
<b>Technical Analysis</b>		
	XIII. Water Quality Characterization	Initiation/Management by Interim Committee Manager
	XIV. Estimate Baseline Salt Loading	Initiation/Management by Interim Committee Manager
	XV. Modeling Existing Water Quality	Initiation/Management by Interim Committee Manager
	XVI. Evaluate Compliance with Proposed Objectives	Initiation/Management by Interim Committee Manager
<sup>1</sup> The roman numerals preceding activities refer to the activity numbering as found in the workplan flow table (Attachment 2).		
<b>Implementation Planning</b> ( <i>this work category is the "Alternative Workplan Approach" proposed by CDM</i> )		
	Review Available Resources in Basin	Initiation/Management by Interim Committee Manager
	Review South Delta Salinity Implementation Actions	Initiation/Management by Interim Committee Manager
	Review Selected Documents to Develop Implementation Alternatives	Initiation/Management by Interim Committee Manager
	Develop 4 Implementation Alternatives	Initiation/Management by Interim Committee Manager
	Develop Method for Screening Alternatives	Initiation/Management by Long-term Committee Manager
	Conduct Workshop on Proposed Alternatives	Initiation/Management by Long-term Committee Manager
	Select Alternatives for Detailed Analysis	Initiation/Management by Long-term Committee Manager
	Conduct Detailed Analysis of Alternatives	Initiation/Management by Long-term Committee Manager
	Select Final Implementation Alternative	Initiation/Management by Long-term Committee Manager
	Develop Program of Implementation	Initiation/Management by Long-term Committee Manager
	Identify Critical Implementation Components	Initiation/Management by Long-term Committee Manager

**Request for Submission for Release June 11, 2012**

**San Joaquin Valley Drainage Authority, Central Valley Salinity  
Coalition and CV-SALTS Initiative**

**Request for Qualifications (RFQ) 2012-004  
For Consulting Services to Provide**

**Committee Management Services**

**Supporting CV-SALTS Lower San Joaquin River Committee**

## **1 INTRODUCTION**

### **Organization Background**

The Central Valley Salinity Alternatives for Long Term Sustainability (CV-SALTS) is a stakeholder driven effort intended to provide long term economic and environmental sustainability throughout the Central Valley while simultaneously satisfying the requirements of the State's Recycled Water Policy. The Central Valley Salinity Coalition (CVSC) was formed in 2008 to integrate and augment the efforts of CV-SALTS. The purpose of the organization is the governance and organization of the efforts needed to plan, develop, and implement a Salinity and Nutrient Management Plan for the Central Valley. The Lower San Joaquin River (LSJR) Committee is a CV-SALTS sub-committee tasked with developing a proposed basin plan amendment to establish water quality objectives for salt and boron for the San Joaquin River upstream of Vernalis.

### **Project Background**

In September 2004, the Central Valley Regional Water Quality Control Board (Central Valley Water Board) adopted a Basin Plan Amendment (amendment) to meet salinity objectives at Vernalis. The amendment also called for the future development of salt and boron water quality objectives upstream of Vernalis. The LSJR Committee is directing the effort to develop those objectives as well as a plan for implementing them. The committee is currently in the process of securing a committee manager to oversee the day-to-day activities of the committee and to help guide the process to a successful completion.

The objective of this RFQ is to receive qualifications from entities with management experience in a stakeholder regulatory environment, knowledge of agricultural salinity issues, particularly those of the San Joaquin River Basin, and administrative and technical experience for basin planning support. The intention is to contract with an entity (herein referred to as Consultant) to perform services as a Committee Manager for the LSJR Committee's effort. The purpose of this request is to receive RFQ 2012-04

Consultants' qualifications for various administrative, technical, and managerial services to help insure that the proposed Basin Plan Amendment is developed in a timely manner, that it is administratively and scientifically defensible, and that it contains all information needed to support a Basin Plan Amendment. The selected Consultant will receive oversight and direction from the LSJR Committee and will have the primary responsibility for facilitating the implementation of a workplan that identifies the critical path for studies and other activities needed to insure successful completion of the project.

CV-SALTS has committed approximately \$300,000 for support of a committee manager to complete this effort. The final proposed Basin Plan Amendment must be completed by July 2014.

## **2 SJVDA Contract and CV-SALTS Coordination**

The funding for the Committee Manager will come from the State Water Resources Control Board (State Water Board) Clean-up and Abatement (CAA) Fund through a contract with the San Joaquin Valley Drainage Authority (SJVDA). The contract will be executed between SJVDA and the Consultant for the scope of work. Primary day to day coordination will be with the LSJR committee.

### **2.1 Request for Qualifications**

This request is for a Statement of Qualifications (SOQ) for providers of professional services to accomplish the scope of work shown in Attachment A. Responding entities shall provide qualifications for all areas within the scope. The Consultant will provide a SOQ also documenting their project approach, hourly rates, any other rates or charges, any travel costs and any other charges. Charges or fees not included will not be allowable costs under the contract.

Consultant should address how they would manage the tasks under the contract. They should also address how they would manage the work of outside parties, volunteers or in-kind work provided.

### **2.2 Committee Manager Work, Schedule and Budget**

While this SOQ will focus on qualifications for the Committee Manager, the Consultant should also provide a description of their approach to management of the committee and the project in general. The consultant should propose a budget, work breakdown structure, and schedule based on a project completion date of July 2014. These documents should illustrate the qualifications of the proposed Committee Manager and provide the draft source documents for the contract with the Consultant.

Cost assumptions should be well documented and organized to allow the Executive Committee to increase or decrease efforts based on available funding, duration or work load. The Consultant should list all materials, equipment, labor, planning and coordination they will provide to ensure the services listed in Attachment A are provided.

CV-SALTS will require the Consultant commit to providing the selected individual as Committee Manager for the duration of the program. Should the individual become unavailable, the contract may be terminated.

### **3 Scope of Work**

The scope of work is shown in Attachment A.

### **4 Instructions**

Responses to this RFQ must be made according to the requirements set forth in the Scope of Work. Failure to adhere to these requirements or to include conditions, limitations, or misrepresentations may be cause for rejection of the submission. Any correction and resubmission by the proposer will not extend the time for evaluation of the submission. SOQ documents will be reviewed by a group composed of members of Lower San Joaquin River Committee and Executive Committee. Submit one electronic file and six (6) complete copies of the submission and related information to:

San Joaquin Valley Drainage Authority  
c/o Joseph C. McGahan  
Summers Engineering  
887 N. Irving St.  
P.O. Box 1122  
Hanford, CA 93232  
[jmcgahan@summerseng.com](mailto:jmcgahan@summerseng.com)

All submissions must be received by July 10, 2012 – 4:00 pm.

#### **4.1 Required Information**

All submissions must include the following information:

1. Cover letter, including name, telephone number, and address of the firm
2. Table of contents
3. Description of the firm's business; *i.e.*, individual, partnership, joint venture, etc.
4. Background information about the proposer, including technical qualifications and licenses
5. Description of the Consultant's experience, including the scope of similar projects
6. Complete description of the Consultant's qualifications for the work
7. Proposed scope of work for the Committee Manager task
8. Detailed project schedule for the Committee Manager task
9. Fee proposal shall include breakdown of labor hours, expense reimbursement schedule that includes cost of non-labor for the Committee Manager task
10. Hourly billing rates
11. Any exceptions to the Standard Services Agreement (Attachment B).

### **5 Evaluation Criteria**

## 5.1 Technical Qualifications

Evaluation of Technical Qualifications will be conducted based on the following:

1. Responsiveness to RFQ, and SOQ organization and clarity
2. Experience and qualifications of the Consultant:
  - a. Management in a stakeholder regulatory environment
  - b. Salinity issues
  - c. Basin Planning and successful basin plan amendment completion
  - d. Administrative and technical skills and experience in studies supporting basin planning
  - e. Regional planning and agricultural issues
3. Project approach and understanding
4. Project management qualifications of the Consultant
  - a. Demonstrated management experience
  - b. Track record of completion of complex tasks on schedule
  - c. Scope, cost and schedule development and review
  - d. Coordination, reporting and responsiveness in a stakeholder environment

## 5.2 Cost

Evaluation of Cost will be on the basis of the following:

1. Clarity and completeness of the breakdown of costs and explanation for the Committee Management task
2. Appropriateness of proposed fee structure and anticipated value and quality of services received for the Committee Management task
3. Total cost compared to the value of products and services

The selection process is anticipated to include an evaluation of the qualifications and cost proposal for the Committee Manager task and may include an interview with top ranked firms.

## 6 General Requirements

All proposers are hereby advised that this RFQ is an informal solicitation and is not a commitment or offer to enter into an agreement or engage into any competitive bidding or negotiation pursuant to any statute, ordinance, rule, or regulation. CVSC, San Joaquin Valley Drainage Authority (contractor), and Central Valley Water Board reserve the right to negotiate with any qualified source. CVSC, contractor and Central Valley Water Board reserve the right to reject any or all submissions for any reason or for no reason at all.

CVSC, contractor and Central Valley Water Board reserve the right to request further information from the proposer, either in writing or orally. Such request will be addressed to that person or persons authorized by the proposer to represent the proposer. CVSC, contractor, and Central Valley Water Board reserve the sole right to judge the proposer's representations, either written or oral. The CV-SALTS Executive Committee will make the final selection decision for the award contract.

Proposers understand and agree that submission of the SOQ constitutes acknowledgement and acceptance of, and a willingness to comply with, all terms, conditions, and criteria contained in this RFQ.

False, incomplete, or unresponsive statements in connection with a submission may be sufficient cause for the rejection of the submission. The valuation and determination of the fulfillment of the above requirement will be CVSC, contractor, and Central Valley Water Board responsibility and its decision shall be final.

The CVSC, contractor, and Central Valley Water Board reserve the right to interpret or change any provisions of this RFP at any time prior to the submission date. Such interpretations or changes will be in the form of addenda to this RFQ. Such addenda will become part of this RFQ and may become part of any resultant contract. Such addenda will be made available to each person or organization that is known to have received this RFQ. Should such addenda require additional information not previously requested, a firm's failure to address the requirements of such addenda might result in the submission being disqualified or ranked lower in review. All SOQs submitted in response to this RFQ will become the exclusive property of the CVSC, contractor, and Central Valley Water Board and will be made available to CV-SALTS stakeholders.

This project is intended to be funded from Cleanup and Abatement (CAA) funds awarded by the SWRCB. The terms and condition of those funds and the requirements of that contract will apply to the contractor. The contractor or other CV-SALTS entities may, at their discretion, fund this project from proceeds of State, Federal or other grants or agreements and consultant contract may be managed by the agency providing funding with different or additional requirements which must be complied with. These issues will be resolved at the time of contracting with the selected contractor.

The CVSC, contractor and Central Valley Water Board shall not in any way be liable for any costs incurred in connection with the preparation of any submission submitted in response to this RFQ.

The Consultant shall execute a Standard Agreement for services with the selected agency. The contractor terms are shown in Appendix B. Submission of an SOQ is deemed accepting terms and conditions without exception unless noted in the submission.

## 7 Schedule of Submission Events

The following table contains the expected schedule of events for the RFQ process. SJVDA and the CVSC retain the right to modify this schedule as needed to support unexpected circumstances.

<b>Activity</b>	<b>Dates</b>
RFQ Distributed/posted to website	June 11, 2012
Submissions Due	July 10, 2012 – 4:00 pm
Committee Recommendation of Award	July, 24, 2012
CVSALTS Executive Committee Approval	August 16, 2012
Agency Approval	September 4, 2012.
Execution of Agreement with Contractor	September 11, 2012

## 8 SOQ Authorization

(Please provide this document on your letterhead)

I certify I am authorized to submit this SOQ on behalf of my company, \_\_\_\_\_ (company name), and this submission conforms to required specifications unless otherwise noted.

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Submission Submitted by

\_\_\_\_\_  
Title

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Email

\_\_\_\_\_  
Telephone Number

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Facsimile Number

Draft