



Socioeconomic Monitoring

A Proposal to the Amador Calaveras Consensus Group

This proposal is for discussion and potential modification based on discussion, interests, and needs of the group.

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Sierra Institute for Community and Environment

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I. Scope of Work: Cost and Time Estimate

Performing the socioeconomic tasks outlined in the ACCG's RFP involves three tasks, with an optional fourth task described below.

Task 1: Provide recommendations to the ACCG regarding its *Socioeconomic Monitoring Objectives, Questions, and Indicators Matrix*

The Sierra Institute will:

- Discuss and review with the ACCG's *Socioeconomic Monitoring subcommittee Objectives, Questions, and Indicators Matrix* through the lens of social science and refine it based on (1) the goals of the group; (2) peer reviewed socioeconomic monitoring methodology; (3) data availability; (4) projected time and cost of collecting data and monitoring the various indicators and measures; (5) related to ease and likelihood of future use; and (6) what has been used and worked well for other CFLRs across the county.
- Draft a refined monitoring matrix;
- Hold a workshop to review the refined matrix with the ACCG Collaborative and/or its monitoring working group to discuss the monitoring framework and included indicators and measures; and
- Finalize the monitoring matrix based on the workshop and related work with the group.

Work will involve initial assessment of data availability, and discussion of indicators and measures to be included with ACCG participants in order to most effectively address unique dimensions of the groups' work and advise the group on the final cost-effective matrix.

Deliverables: A workshop to review and discuss the matrix as a Collaborative and/or the monitoring sub-group; a finalized *Socioeconomic Monitoring Objectives, Questions, and Indicators* matrix using a "conditions, indicators, and measures" framework.

80 hours | Timeline: 3 months | Travel: 1 trip to ACCG

Task 2: Data Collection and Reporting Methodology Templates (Two Phases)

Task 2, Phase I: Baseline data collection, analysis and interpretation.

The Sierra Institute will:

- Populate the data sets of the indicators and measures included in the matrix through:
 - Census and other public and secondary records review;
 - delineation of communities based on Census block group boundaries and refined through a workshop;

- a qualitative and quantitative local business assessment, including utilization of data from contractor surveys developed by ACCG as appropriate, to respond to indicators of interest to the group;*
 - secondary data review of Forest Service recreation data or other existing recreation data (to inform question 4 of Objective 9.1);**
 - Comprehensive data collection and analysis—including interviews and secondary data review, and blending and triangulating diverse information to identify and track the contribution and the opportunities presented by restoration-related employment and training to local rural economies, forest contractor networks, and workers;
 - a stakeholder workshop to assess community capacity; and
 - other interviews and quantitative and qualitative data evaluation to assess other conditions as identified by the monitoring subgroup and over the course of this assessment.
- Analyze the data for trends and recommendations, such as what institutions and infrastructure are linked to landscape management activities and how they can, in turn, be strengthened to improve social, economic, and equity outcomes.

Deliverables: Combined with Deliverables of Task 2.

400 hours | Timeline: 6-9 months

Travel: 3 trips to ACCG (one of which will be combined with the trip in Task 1)

** We include a survey of businesses to respond to questions raised in objective 9.1, but determination of causality associated with “effects of the Cornerstone program” will be difficult to impossible to determine for some measures. Determination of causality (with a high degree of confidence) involves primary data collection and assessment and testing hypothesis through experimentation, which is beyond the scope of a monitoring program. That said, Sierra Institute will identify causality when possible and discuss correlation as appropriate, and both when supporting data allows us to do so.*

*** Understanding the “effects of the Cornerstone program” on recreation opportunities requires direct survey of recreation users. This is a costly undertaking and beyond the scope of this monitoring program. Sierra Institute will interview Forest Service officials, ACCG members, and others, examine secondary data and through triangulation of data assess the impact of Cornerstone work on recreation opportunities and indicators outlined, but no comprehensive primary recreation user information will be collected.*

Task 2, Phase 2: Reporting and Monitoring Templates

The Sierra Institute will work with ACCG monitoring subcommittee members and/or designated leads to document results using a “conditions, indicators and measures” framework, and describe the methods used, recommended methodology/templates to facilitate future assessment work, and other key findings in a final report. Refining and finalizing the draft will involve teleconferences and email exchanges with the monitoring subcommittee. The methodology and corresponding templates will include recommended

data sources for each indicator and measure, recommended frequency of data collection, and, through working with group members, identification of thresholds that would indicate a significant improvement or decline, as well as needed surveys and interview guides. The Sierra Institute will also develop a standard operating procedure for data management and analysis. The Sierra Institute will present this report during an in-person presentation. During this presentation, the Sierra Institute will discuss how the ACCG's projects can affect/respond to socioeconomic issues of concern, including employment and training, impact on local rural economies, and forest contractor networks; we will also explore and discuss with the group how projects can be structured to improve socioeconomic outcomes.

Deliverables: A report summarizing the methods used, key findings, and multiparty socioeconomic monitoring procedures as well as templates; and an in-person presentation and discussion on this report. This will include an estimate of time to collect data and evaluate indicators.

200 hours | Timeline: 3-6 months | Travel: 1 trip to the ACCG

Task 3: Training

Sierra Institute staff will work with subcommittee members or designated leads on the project with the intention of building capacity to carry on with this work in the future. After the Collaborative has had two months to review the final report and the Sierra Institute's recommendations, the Sierra Institute will facilitate a training workshop on the implementation of the multiparty monitoring plan. This will involve training on the various tools to be used throughout the monitoring program, best practices for data management and analysis, and an introduction to field implementation.

Deliverable: A training workshop on the application of the multiparty monitoring program developed.

80 hours | Timeline: 1-3 months | Travel: 1 trip to the ACCG

Task 4: Contractual Post Project Support (with remaining unused hours should there be any, but not part of this bid)

The Sierra Institute will make itself available for technical support and troubleshooting during the early phases of the implementation of the ACCG's multiparty management socioeconomic monitoring program. This work could include updating or revising indicators as appropriate.

Hours billed as contracted (on a need-be basis). Rates for post-project support would be \$75 to \$100/hour, unless otherwise agreed upon.

Table 1: Project Budget

Labor Expenses	Staff Time	Hourly Rate	Cost
Task 1 , Refining the ACCG’s <i>Socioeconomic Monitoring Objectives, Questions, and Indicators Matrix</i>	30 50	\$100 \$75	\$6,750
Task 2, Phase 1 , Baseline data collection, analysis and interpretation.	60 340	\$100 \$75	\$31,500
Task 2, Phase 2 , Reporting on the Baseline Data Study and Monitoring Methodology & Templates	50 150	\$100 \$75	\$16,250
Task 3 , Training	30 50	\$100 \$75	\$6,750
LABOR SUM ¹	760		\$61,250

Travel Expense	Cost/Unit	# of Units	Cost
Mileage for Personal Vehicle Travel ²	\$0.54	2210	\$1,193
Per Diem Food Costs ³	\$71.00	20	\$1,420
Lodging Costs ⁴	\$100.00	20	\$2,000
TRAVEL SUM			\$4,613

Potential Match to Facilitate Cost Share Agreement with the Forest Service

The Sierra Institute is willing to work with ACCG and the Forest Service to establish a Cost-Share Agreement should the Sierra Institute be selected to provide its socioeconomic monitoring services. The Sierra Institute will provide a 20 percent match (\$13,173) to meet the USFS cost-share matching requirements, making the cost of this contract \$52,690 for the ACCG.

Total Projected Cost: \$65,863 | Timeframe Estimate: 12-18 months
Sierra Institute Match: \$13,173 | ACCG Cost: \$52,690

II. Qualifications

Organization: Sierra Institute for Community and Environment
 Project Staff: Dr. Jonathan Kusel, Kyle Rodgers, Lauren Burton, and other staff as assigned

For 24 years, the Sierra Institute for Community and Environment has developed innovative programs by engaging forest communities in applied social science research, pilot studies, and collaborative problem solving. Recognizing the direct relationship that rural communities of the Sierra have with forested landscapes, the Institute strives to promote social, environmental, and economic approaches that are sustainable from human and ecological perspectives.

¹ This sum does not include the Optional Task 4, Contractual Post Project Support)
² Miles traveled are based on five trips to and from Taylorsville to West Point, 422 miles roundtrip
³ Per diem food units are based on four trips to West Point, two days each, with two staff
⁴ Lodging units are based on four trips to West Point, needing two hotels room for one night twice and two hotel rooms for two nights twice.

Executive Director Dr. Jonathan Kusel and Social Sciences Program Lead Kyle Rodgers and Program Assistant Lauren Burton, will act as the key Project Staff for the Sierra Institute's socioeconomic monitoring services offered to the Amador-Calaveras Consensus Group.

Dr. Kusel was responsible for assessment and analysis of community well-being for the Northwest Forest Plan developed under the Clinton Administration. He also led the community assessment and public involvement teams for the Sierra Nevada Ecosystem Project. Dr. Kusel recently completed a pilot project for the California Department of Water Resources in which his team worked with local residents and agency leaders to identify watershed-focused indicators and measures to understand socioeconomic health and institutional capacity by watershed. The Sierra Institute recently completed a socioeconomic assessment for the Dinkey Collaborative and CFLR.

Dr. Kusel received his Ph.D. from the University of California at Berkeley in natural resource sociology and policy, a Master of Forest Science/Social Ecology from Yale School of Forestry and Environmental Studies.

Kyle Rodgers, Social Science Program Associate at the Sierra Institute, has been working at the intersection of community and the environment since 2013. Kyle has been studying human dimensions of endangered species conservation planning across the Southeast, and holds a Master of Science degree in Wildlife and Fisheries Science from the University of Tennessee.

Lauren Burton holds a Masters degree in Conservation Leadership from Colorado State University and has been with the Sierra Institute since early 2016. Her thesis research focused on Traditional Ecological Knowledge and local forest product use among farmers in Western Uganda.