

Westervelt Ecological Services Western Region Bank Entitlement Process Improvements 2014-2015

Began with an “After-Action Review” *with* IRT Agencies after signature of Colusa Basin Mitigation Bank

The IRT requests for future Bank review and processing:

- Utilize a shared calendar with clear expectations of when comments are due and when Bank Signature is expected
- Consolidate all Agency comments for each exhibit under the appropriate headings
- Re-submit only revised documents after receiving comments
- Keep track of document submittals and comments in a table
- Date all revised documents in footer to correspond to dates in table of submittals

Westervelt Internal changes instituted for Grasslands Mitigation Bank (a four agency bank):

- Meet with each Agency representative before each submittal to brief them, identify any concerns or issues(all Agency representatives invited to all meetings)
- Work to get early agreement on significant issues (crediting, service areas, easement language)
- Meet with each Agency representative after receiving written comments to ensure the comments are understood and that our planned response is acceptable
- Hire a professional editor to increase accuracy of submittals and reduce typos
- Utilized weekly WES team meetings and meeting notes/agendas to track completed and pending tasks
- With each submittal include a revised table of document submittals and the schedule highlighting next steps for the agencies

Results:

- Increased project understanding by Agencies from face-to-face briefings/meetings
- Decreased comments from agencies on formatting, inaccurate details
- Decreased re-submittals due to appropriate revisions/responses to comments
- Increased ability to track versions of documents, making submittals complete
- Significantly reduced delay in signatures from target date
- Stronger working relationships with Agency representatives

Grasslands Timeline: (Signature Target Date June 10, 2015)

- December 2013 Draft Prospectus Submitted
- March 2014 Prospectus Submitted
- July 2014 Draft BEI Submitted
- January 2015 Revised Documents Submitted
- March 2015 Revised Documents Submitted
- April 2015 Permits Submitted
- June 2015 Revised Documents Submitted (new USFWS representative)
- Bank Signatures July 2-8 (less than one month beyond target date)