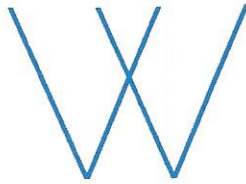




Welcome to the 2016 Spring Summit



When Bay Planning Coalition (BPC) was founded 33 years ago, it was impossible to foresee all that would change for the Bay in the coming decades. From the development of new regulatory bodies and technologies to the increased attention on climate change and sea level rise, it is a very different place today than it was then.

In thinking about that as we planned this year's program, we were inspired to look ahead. What might the next 33 years hold for the Bay and our region? Are we ready for it? Today will be focused on answering this question as it relates to three areas that affect BPC's members most directly: dredging and beneficial reuse; sustainable waterfronts; and infrastructure.

Many of you may be surprised to see that we have renamed this annual event, which for almost 30 years was called the Decision-Makers Conference, but it is part of a refresh we hope will be evident throughout the day. The change fits well with our theme's focus on the future.

This year our expert panels will be focused directly on furthering the conversation around the risks and rewards tied to the changes coming to the issues our members care about most. Rather than making lengthy presentations, panelists will be in conversation with each other and with the audience. Furthermore, we'll be asking the audience to participate in a new way by using the provided "clickers" to answer questions throughout the program. This year's agenda also features additional opportunities for networking; particularly over the lunch hour.

What hasn't changed is the high caliber of our speakers and attendees. Today's speakers and audience include leaders in industry, commerce, regional planning and infrastructure from across the wider Bay Area, including representatives from key corporations in the gas, construction and engineering sectors. This event is also well attended by local, state and federal officials and by the nonprofit community. This is a true opportunity for a meaningful and varied discussion.

As always, we hope to focus together on solutions that will strengthen and grow a strong, sustainable and resilient maritime and industrial economy and ecosystem for San Francisco Bay and the surrounding region.

In addition to welcoming all of you I would like to take this opportunity to thank the committee of BPC members who helped to plan this year's Spring Summit. The members of this committee are: Richard Sinkoff, Port of Oakland (chair), Amy Brekenridge, ERM; Bill Butler, Lind Marine, Inc.; Len Cardoza, AECOM; Art Coon, Miller Starr Regalia; Ane Diester, Parsons Corporation; Walt Gill, Chevron Corporation; David Ivester, Briscoe Ivester & Bazel LLP; Laura Kennedy, Kennedy/Jenks Consultants; and Scott Warner, Ramboll Environ, Inc.

If this is your first BPC event, we hope you will join us for future events throughout the year. Our workshops and expert briefings provide great opportunities for networking and for exploring some of these key issues on a deeper level. Our staff is also always happy to discuss the many benefits of BPC membership.

Thank you for joining us at the 2016 Spring Summit. We hope you enjoy being part of the conversation.

John A. Coleman
Chief Executive Officer



Agenda

8:00am	REGISTRATION AND CONTINENTAL BREAKFAST
8:45am	<p>WELCOME</p> <p>John Coleman, Chief Executive Officer, Bay Planning Coalition David Ivester, Briscoe Ivester & Bazel LLP and President, Bay Planning Coalition</p>
8:55am	<p>WASHINGTON UPDATE</p> <p>Eric Sapirstein, Founder & President, ENS Resources</p>
9:15am	<p>CONVERSATION 1: Can We Dig Ourselves Out of What's Coming? Dredging, Beneficial Reuse, and Measure AA</p> <p>Call to Action: Larry Goldzband, San Francisco Bay Conservation and Development Commission</p> <p>Moderator: Josh Burnam, Anchor QEA</p> <p>Panelists: Bill Dutra, The Dutra Group Amy Hutzel, California State Coastal Conservancy David Lewis, Save The Bay Al Paniccia, U.S. Army Corps of Engineers</p>
10:30am	BREAK
10:45am	<p>CONVERSATION 2: Planning for Probabilities: Preparing a Sustainable Bay Waterfront</p> <p>Call to Action: Will Travis, Planning Consultant</p> <p>Moderator: Dilip Trivedi, Moffatt & Nichol</p> <p>Panelists: Warner Chabot, San Francisco Estuary Institute Kevin Conger, CMG Landscape Architecture Prof. Kristina Hill, UC Berkeley David Smith, Stice & Block LLP</p>
12:00pm	<p>PRESENTATION OF THE FRANK C. BOERGER AWARD</p> <ul style="list-style-type: none"> • This year's recipient is Monique Moyer, Past Executive Director, Port of San Francisco. • John Briscoe, Briscoe Ivester & Bazel LLP • Richard Sinkoff, Port of Oakland and Vice President, Bay Planning Coalition
12:15pm	<p>BUFFET LUNCH & NETWORKING</p> <p>We hope attendees and speakers will use this time to move freely about the room in order to make new contacts and strike up interesting conversations. One of the key goals of our "refresh" of this event is for this type of networking to happen more easily.</p>
1:00pm	KEYNOTE SPEAKER
1:30pm	<p>BAY PLANNING COALITION INTERN PRESENTATION</p> <ul style="list-style-type: none"> • Richard Sinkoff, Port of Oakland and Vice President, Bay Planning Coalition • Kevin Prochnow, Student, California Maritime Marine Academy
2:00pm	<p>REMARKS BY CONGRESSWOMAN BARBARA LEE</p> <ul style="list-style-type: none"> • U.S. Representative Barbara Lee (D-Oakland)
2:15pm	<p>BREAK</p> <p>Dessert will be served during this break.</p>
2:30pm	<p>CONVERSATION 3: Everything is Rising: Infrastructure for a Changing Bay</p> <p>Call to Action: David Williams, Bay Area Clean Water Agencies</p> <p>Moderator: Tom Guarino, PG&E</p> <p>Panelists: Joe Birrer, San Francisco International Airport Allison Brooks, Bay Area Regional Collaborative Diana Sokolove, City and County of San Francisco Thanh Vuong, Port of Oakland</p>
3:45pm	<p>CLOSING REMARKS</p> <ul style="list-style-type: none"> • John Coleman, Chief Executive Officer, Bay Planning Coalition
4:00pm	ADJOURN

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Bay Planning for the Next 33 Years: Risks, Readiness & Rewards

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Together, We Are Powering Jobs and Empowering Communities!



Generating Over 73,000 Jobs In The Region and Nearly 827,000 Jobs Across The Country





About Bay Planning Coalition

CELEBRATING 33 YEARS OF ACCOMPLISHMENT

Incorporated in 1983, the Bay Planning Coalition (BPC) is a non-profit 501(c)(4), membership-based organization representing public and private entities in the maritime industry and related shoreline businesses, ports and local governments, landowners, recreational users, labor unions, residential and commercial builders, environmental and business organizations, and professional service firms in engineering, construction, law, planning and environmental sciences.

BPC emerged from a group of Bay Area citizens and representatives of local government and private industry who became concerned about the increasing complexities and inefficiencies in the regional, state and federal permit processes. Instances were documented where unreasonable permit conditions, delays and over-reaching policies impeded the economic use of land and water for commerce and essential infrastructure to serve population needs. BPC was formed to correct this problem and establish a working balance in Bay permitting and planning processes to reduce unwarranted costs, delays and uncertainties for Bay development projects.

BPC activities have expanded to cover not only the permit process, but also essential planning, communication and consensus-building related to navigation and dredging, trade and manufacturing, CEQA, NEPA, water and air quality, water supply, transportation, and wetlands and wildlife issues.

Our mission:

Working through a broad coalition to provide expert advocacy and facilitation to advance a strong industrial economy that supports a sustainable environment within San Francisco Bay and its watershed.

Our vision:

Provide visionary leadership for San Francisco Bay stakeholders as an effective coalition that vigorously advances solutions for a thriving economy, environment and community.

KEY ISSUES

Federal Policy

BPC keeps careful watch over federal water and energy appropriations that affect the San Francisco Bay and its watershed. Key federal issues we are engaged with at the moment include:

- The Water Resources and Development Act (WRDA)
- The Harbor Maintenance Trust
- The proposed Environmental Protection Agency (EPA) ruling on the definition of "waters of the United States" under the Clean Water Act
- Tax reform to maintain tax exempt financing for port authorities
- New opportunities at the federal level for public-private partnerships
- Alternative energy initiatives to reduce port costs
- Implementation of ballast water regulations to address invasive species issues
- Potential legislation and funding opportunities to address the national infrastructure crisis

State and Regional Policy

The policy landscape across the greater Bay Area and in the state is increasingly complicated; particularly as environmental issues like California's ongoing drought and sea level rise gain more attention.

BPC maintains an active role in the development and implementation of policy at the state and regional level through:

- Active Involvement with regional and state politics, including political appointments
- Engagement with key regional agencies, including attending public meetings, holding additional meetings with officials, and building strong relationships with both officials and staff
- Active participation in the implementation of the Long Term Management Strategy for Dredged Material in the San Francisco Bay (LTMS)
- Education and outreach
- Advocacy on behalf of BPC members on issues including sand mining and CEQA

STRATEGIC PARTNERSHIPS

BPC regularly partners with other stakeholders to engage in policy efforts that benefit BPC members and the region. While this is sometimes done ad hoc around specific policy issues, there are some established coalitions that we expect to remain active in through 2016.

Bay Area Business Coalition (BABC). BPC is one of several nonprofit business-related advocacy organizations that joined ranks in 2011 to form BABC. The other organizations involved include the Bay Area Council, BIA Bay Area, the East Bay Leadership Council, East Bay EDA, the Jobs & Housing Coalition, the North Bay Leadership Council, SAMCEDA, and Solano EDC.

San Francisco Bay Regional Coastal Hazards Adaptation Resiliency Group (CHARG). CHARG, started in 2014, is a working group of over 100 engineers, planners, scientists and policymakers brought together to develop and implement regional flood protection solutions to sea level rise and extreme tides. Specifically, this group seeks to improve regional coordination among federal, state and local officials, the private sector and NGOs when it comes to these issues.

San Francisco Bay Joint Venture (SFBJV). The goal of this nonprofit is to protect, restore, increase and enhance all types of wetlands, riparian habitat and associated uplands throughout the San Francisco Bay region to benefit birds, fish and other wildlife through biologically-based actions. BPC attends SFBJV meetings to stay updated on the status of restoration projects taking place in the Bay Area and to learn about how BPC and its members could become beneficially involved in these efforts.

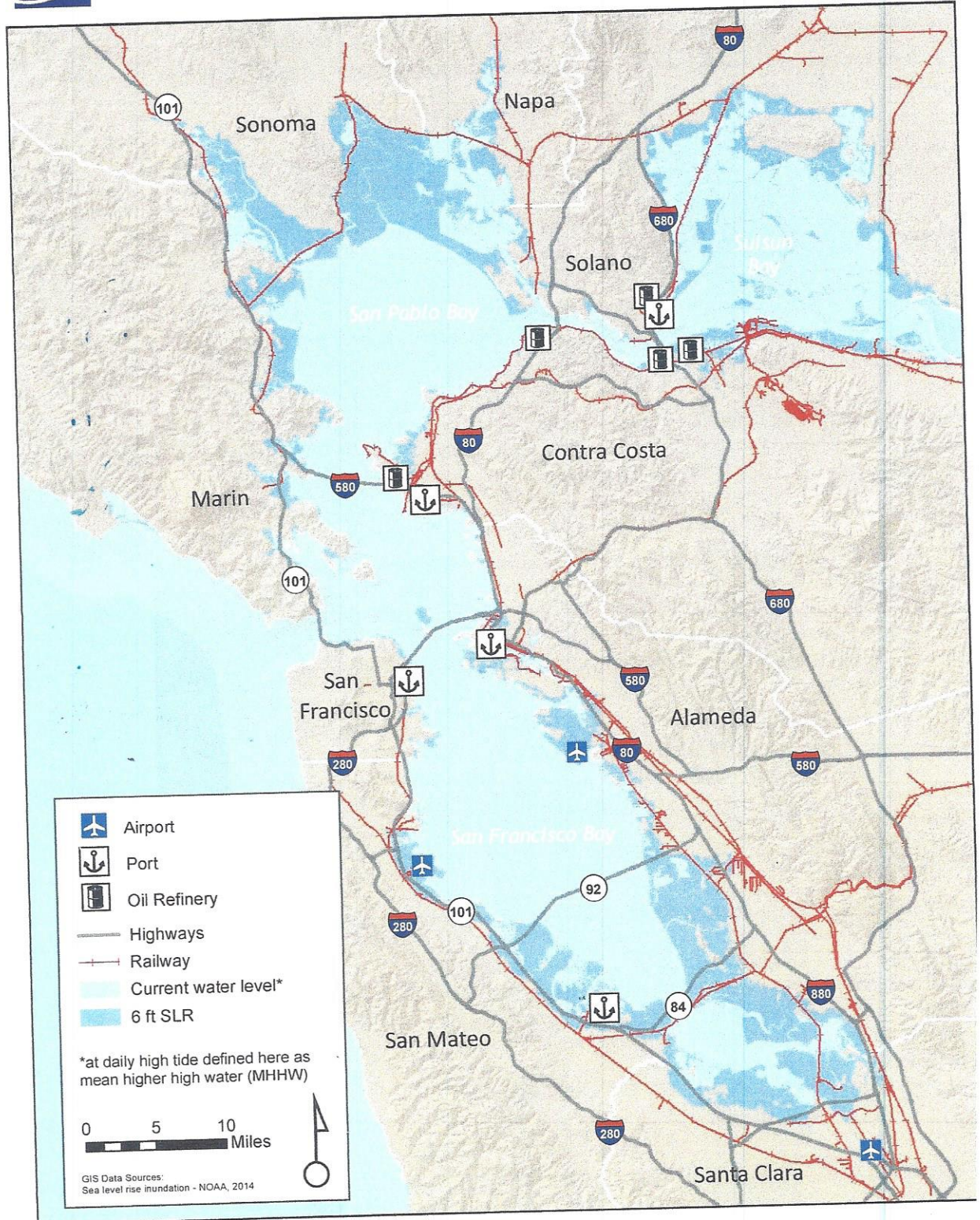
The San Francisco Estuary Institute (SFEI) Regional Monitoring Program Steering Committee. The Regional Monitoring Program (RMP) is a collaborative effort between SFEI, the San Francisco Regional Water Quality Control Board (SFRWCQB) and the regulated discharge community. It is SFEI's largest program and its primary purpose is to provide water quality regulators with data and information about contamination and other measures of estuary health so that decisions can be made about how to manage it. Additionally, the RMP, in collaboration with SFRWCQB, sets the fees that must be paid by dredgers. It is currently in the process of developing a new fee schedule that it says is needed to cover its costs, and Bay Planning Coalition has been working closely with the RMP Steering Committee to develop a fee schedule that works for all parties and is based on recommendations made by BPC members.





Bay Area Sea Level Rise and Vulnerable Infrastructure

Bay Planning for the Next 33 Years: Risks, Readiness & Rewards



Northern California's Economy



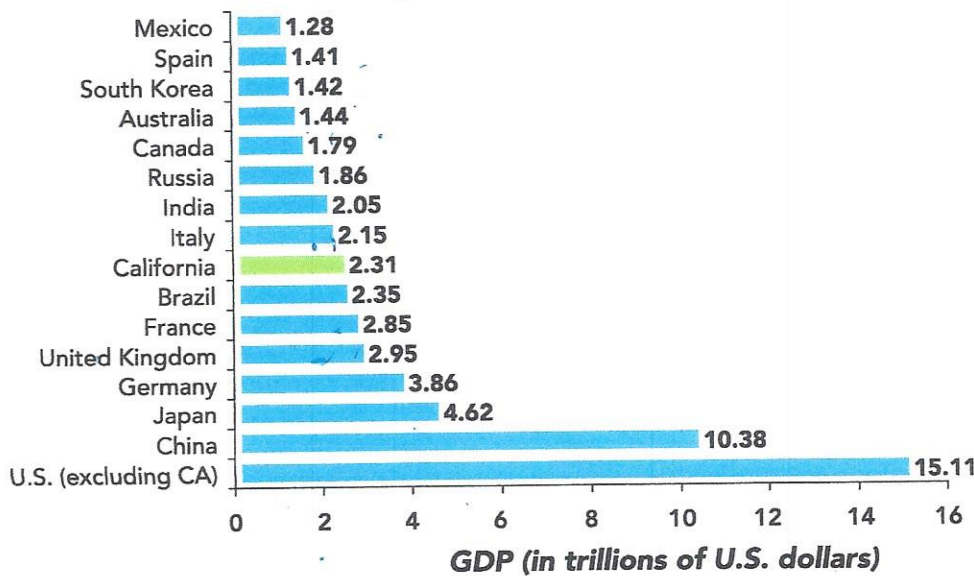
STATE

- In 2014, California experienced a 2.8% growth in GDP with a total of \$2.31 trillion
- California is currently the world's 8th largest economy tied with Brazil and followed by Italy, India, and Russia
- California ranks 7th in GDP per capita followed by Sweden, San Marino, and Singapore
- California has the largest state-level economy in the United States followed by Texasⁱ
- California continues to outpace national growth in years 2011, 2012, 2013, and 2014^{ii, iii}

SAN FRANCISCO BAY AREA

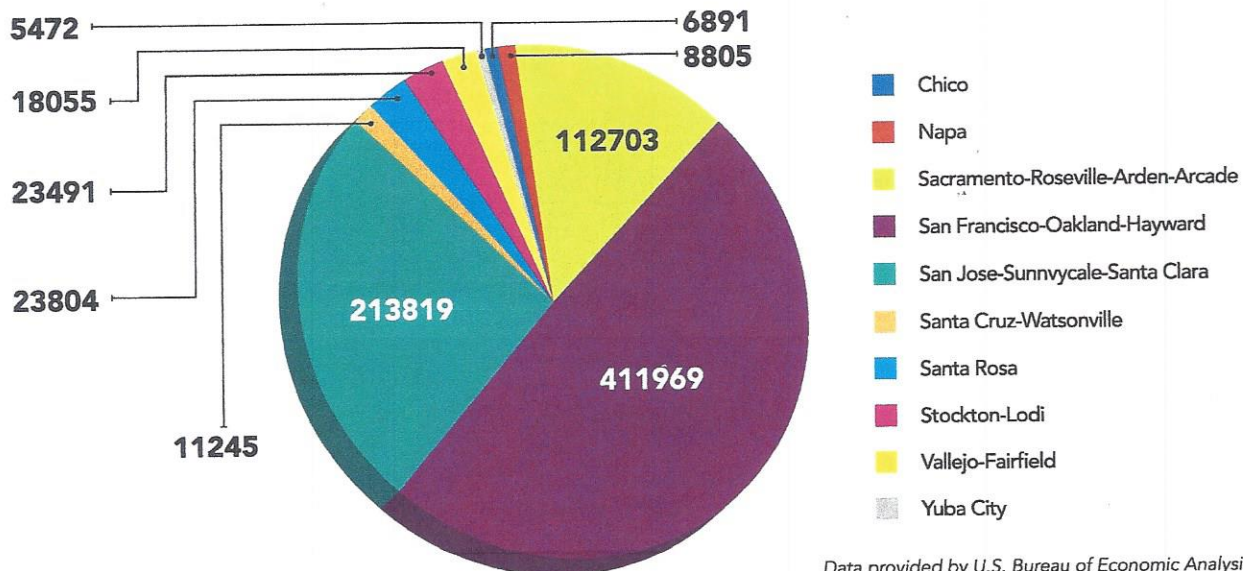
- With a 9.8% employment increase and 10.7% gross regional product increase, the Bay Area has outpaced California and the U.S. in job recovery and expanding output as of 2013^{iv}
- The Bay Area's GDP in 2014 was \$660.8 billion, ranking it 20th in the world between Switzerland and Saudi Arabia^v
- Northern California's combined Metropolitan Statistical Areas add up to an estimated \$836 billion in 2014ⁱⁱⁱ
- With only 17% of California's population, the Bay Area produces 25% of the state's economic output.ⁱ

Top World Economies in 2014

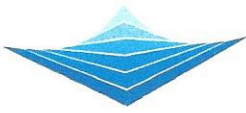


Data provided by Legislative Analyst's Office

GDP of Northern California Metropolitan Areas in 2014 (millions of current dollars)



Data provided by U.S. Bureau of Economic Analysis



Economic Impacts of Ports and Airports

PORT OF BENICIA (AMPORTS)

- >Exports, 2015: 302,061 metric tons, valued at \$23.6 million
- >Imports, 2015: 197,076 metric tons, valued at \$4.5 billion^{vi}

PORT OF OAKLAND

- >Fifth busiest container port in the United States by cargo volume^{vii}
- >Exports, 2015: 6.8 million metric tons
- >Imports, 2015: 6.8 million metric tons
- >The Port of Oakland supports approximately 73,000 jobs in the Northern California mega region^{viii} and impacts approximately 827,000 jobs nationwide^{viii}

PORT OF REDWOOD CITY

- >Exports, 2015: 245,600 metric tons, valued at \$61.4 million (Scrap metal)
- >Imports, 2015: 1.4 million metric tons, valued at \$31.5 million (Sand, Aggregates & Other Dry Bulk)
- >Port-related Jobs, 2015: 600^{ix}

PORT OF RICHMOND

- >Ranks number one in liquid bulks and automobile tonnage among San Francisco Bay ports
- >Import and Export total for privately-owned terminals, 2015: 25 million metric tons
- >Import and Export total for city-owned terminals, 2015: 273,4067 metric tons^x

PORT OF SAN FRANCISCO

- >Commuter ferry - total passengers, 2015: 5.1 million
- >Cruises and Excursions - total passengers, 2015: 5.2 million
 - Total sales: \$55.9 million
- >Imports, 2015: 1.5 million metric tons
- >Estimated value of all cargo, 2015: \$74.6 million^{xi}

PORT OF STOCKTON

- >Imports, 2015: 2.3 million metric tons
- >Exports, 2015: 1.5 million metric tons^{xii}
- >Over \$1 billion in cargo goes through the Port of Stockton each year
- >Supports over 4,500 Port-related jobs, generating \$180 million in annual salaries and benefits^{xiii}

OAKLAND AIRPORT

- >39th busiest airport in North America by passenger traffic in 2014, 13th busiest by cargo volume^{xiv}
- >Approximately 8,000 on-airport jobs^{xv}
- >Total passengers, enplane and deplane, 2014: 10,34 million^{xvi}
- >Cargo exports (freight), 2015: 271,967 metric tons
- >Cargo imports (freight), 2015: 259,449 metric tons^{xvii}
- >Among top 20 airports in the United States in the amount of air cargo handled^{xviii}

SAN FRANCISCO AIRPORT

- >7th busiest airport in North America by passenger traffic 2014, 18th busiest by cargo volume^{xiv}
- >Total economic contribution of SFO amounts to over 288,000 jobs in the greater SF Bay Area
- >\$55.8 billion in related business sales, and \$19.6 billion in total payroll^{xix}
- >Total passengers, enplane and deplane, 2015: 50 million
- >Total cargo handled, 2015: 389,934 metric tons^{xx}

SAN JOSE AIRPORT

- >45th busiest airport in North America by passenger traffic 2014^{xiv}
- >Total passengers, enplane and deplane, 2015: 49.8 million
- >Total cargo handled, including mail, 2015: 48,840 metric tons^{xxi}

Economic Impacts of the Oil and Gas Industries



STATE

- As of 2013, California ranks third nationally in crude oil production and thirteenth in natural gas production
- Direct, indirect, and induced employment by oil and gas industry in California, 2013: 455,940
- Direct labor income, 2013: \$23.2 billion, accounting for 2.9% of California's total labor income
- California's oil and gas industry accounts for 5.7% of the state's total economic output
- Direct employment by oil and gas in 2013 accounted for 17.6% of regional employment

SAN FRANCISCO BAY AREA

- California accounted for 7.3% of total U.S. oil field production in 2013
- Direct, indirect, and induced oil and gas employment in the Bay Area, 2013: 88,060
- Direct labor income in the Bay Area, 2013: \$5.4 billion
- Total tax revenues generated by oil and industry in Bay Area, 2013: \$7 billion
- Total industry output in Bay Area region, 2013: \$77.6 billion, representing 38.1% California's total economic contribution^{xxii}

Sources

- i Legislative Analyst's Office - <http://www.lao.ca.gov/>
- ii Center for the Continuing Study of the California Academy - www.ccsce.com/PDF/Numbers-July-2014-CA-Economy-Rankings-2013.pdf
- iii U.S. Bureau of Economic Analysis - <http://www.bea.gov/>
- iv Association of Bay Area Governments - <http://reports.abag.ca.gov/sotr/2015/executive-summary.php>
- v Newmark Realty Capital, Inc. - <http://news.theregistrysf.com/wp-content/uploads/2015/11/BA-Economic-Engine-2015-6pg-version.pdf>
- vi Airports Accounting/Administration Department
- vii Port of Oakland - www.portofoakland.com/maritime/factsfigures.aspx
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- ix Port of Redwood City Operations Department
- x Port of Richmond Operations Department
- xi Port of San Francisco Maritime Marketing Department
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- xiii Port of Stockton - <http://www.portofstockton.com/port-facts-figures>
- xiv ACI-NA - www.aci-na.org/content/airport-traffic-reports
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- xix San Francisco International Airport - media.flysfo.com.s3.amazonaws.com/default/downloads/reports/SFOEconomicImpactReport2013.pdf
- xx San Francisco International Airport - www.flysfo.com/media/facts-statistics/air-traffic-statistics
- xxi San Jose International Airport - www.flysanjose.com/fl/about/activity/Dec14CY.pdf
- xxii "The Oil and Gas Industry in California: Its Economic Contribution and Workforce in 2013," Los Angeles County Economic Development Corporation (LAEDC Institute for Applied Economics)



Bay Planning for the Next 33 Years: Calls to Action

Some people invest considerable time, creativity, labor and skill in constructing beautiful sand castles on the beach, full well knowing that the next high tide will wash the sand castles away. Perhaps we can draw from this experience and learn how to build beautiful cities along our coastlines, full well knowing that high tides in the future will wash the cities away.

-Will Travis, Planning Consultant

There are few locations in the United States that can more effectively use clean dredged materials to build and restore large- and small-scale natural wetlands to safeguard communities of all types than San Francisco Bay. There is significant cross-the-board public support for such proposals because they provide multi-objective environmental and economic benefits, including flood protection for underserved communities and billions of dollars of public investment, recovery of endangered species, expanded and improved habitat for migratory birds and fish, and upgraded water quality. Fortunately, approximately 2-3 million cubic yards of sediment are dredged to maintain Bay channels annually. While collaboration among government agencies that oversee dredging disposal has ensured that some of the materials are re-used beneficially, much of the dredged material is still squandered due to the costs associated with fulfilling the U.S. Army Corps of Engineers' "federal standard." Clean materials dredged from the Bay need to be transferred to the multiple wetland restoration sites (totaling over 20,000 acres) in the Bay that need sediment, including Mohtezuma Wetlands and Cullinan Ranch and the upcoming Bel Marin Keys and South Bay Salt Ponds projects. The incremental cost of moving just the volume dredged by the U.S. Army Corps of Engineers in the Bay is less than \$5-10 million annually.

Yet, even if I climbed to the top of the Ferry Building, grabbed Dumbledore's wand and used it as a megaphone, and told everyone in the Bay Area that BCDC has approved significant volumes of fill for ports, marinas, habitat and other uses, and does not, per se, oppose filling the Bay to restore or create wetlands or to provide flood protection in other ways, many people will continue to believe our staff unalterably oppose such fill. That is not the case. While filling the Bay for any purpose must continue to be justified, we all know that BCDC's next fifty years will be very different from its first fifty years, and that rising sea level will compel us to add additional fill to the Bay to conserve and develop its resources.

-Larry Goldzband, Executive Director, San Francisco Bay Conservation and Development Commission

As public agencies, wastewater treatment plants have the duty to look to the future and plan how best to protect the public health and to treat society's wastewater in an environmentally sustainable manner. Today however the image of the old sewage plant down by the river should be in the rear view mirror. Yes, the plants still tend to be down by the shoreline but their planning horizons offer many opportunities beyond just treating the sewage. Their primary function continues to be protecting the public health but they also have significant opportunities to enhance the environment, especially in this climate-energy era where sea level rise is inevitable and the need for energy and resources is exerting huge demands on our natural environment. Natural infrastructure such as wetlands fed by recycled water and horizontal levees can produce multiple benefits. A mindset that views, what used to be called wastes, as an opportunity to recover energy and transform the waste to new resources should be the vision for the utility of the future. Now is the time to act. We need to unleash all of the creative thinking and technologies we can muster and go forward with innovative public policy to ensure the future we all desire.

-David Williams, Executive Director, Bay Area Clean Water Agencies