Exhibit A.2

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MONTEREY COUNTY DEVELOPMENT EVALUATION SYSTEM (DES) PROCEDURE MANUAL

Standards, Guidelines and Specified Requirements for the DES

Draft May 13, 2020

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SECTION 1 – INTRODUCTION

A. Purpose

The purpose of the Development Evaluation System (DES) is to implement 2010 General Plan Policy LU-1.19, which establishes Community Areas, Rural Centers and Affordable Housing Overlay districts as top priority locations for development within the unincorporated areas of Monterey County. Consistent with the requirements of Policy LU-1.19, the DES was designed to identify extraordinary developments being proposed outside of those areas by evaluating the project using specified measurement criteria and setting a minimum passing score. The evaluation system was intended to use a methodology that is systematic, consistent, predictable, and quantitative. Projects have an opportunity to receive a maximum score of 100 points possible, with a minimum "passing" score of 70 points. Projects subject to the DES require discretionary permits and in addition to the required findings and evidence, the final DES score received will be taken into consideration by the appropriate hearing body as part of the overall decision. A passing score does not guarantee ultimate project approval. A failing score does not guarantee ultimate project denial. However, according to the ordinance, projects with a failing score will be referred to the appropriate hearing body with a recommendation of denial by staff.

The *Monterey County Development Evaluation System Procedure Manual* ("DES Manual" or "this manual") was adopted by resolution of the Monterey County Board of Supervisors to clarify and provide guidance related the County's process and procedures for projects subject to the Development Evaluation System. The DES Manual is specifically authorized as an informational and implementing tool by Chapter 21.64.xxx of the Monterey County Code, which was enacted by County of Monterey Ordinance No. ____, and may be amended from time to time. The information contained within this manual is applicable to only the inland areas of the County.

The purpose of this manual is to provide applicants with comprehensive guidance to comply with the Monterey County 2010 General Plan Policy LU-1.19 and the Development Evaluation

System (DES) Ordinance, including a clear explanation of specific procedures and related technical information for projects subject to the DES.

B. Appendices

Appendices have been incorporated to provide applicants with a DES package including submittal forms required for compliance with the DES Ordinance, scoring tools that will be used by staff, and other helpful information. The appendices, which may be updated periodically include:

Glossary

Key definitions included in the Development Evaluation System Ordinance are also included in this manual for convenience.

Development Evaluation System Package Submittal Form

Once a project is deemed subject to the DES, certain pieces of information for the project will need to be submitted in order for it to be evaluated. This form shall be completed by the applicant. Information used in the evaluation process will be submitted with this form. See Section 3.B of this manual for additional information on submittal requirements.

The Development Evaluation System Score Sheet Guide

This document is meant to serve as a guide for using the DES Scoresheet. The guide provides applicants and planners information about each measurement criteria including what types of supporting documentation will need to be submitted to obtain points and maximum potential scores. See Section 3.C of this manual for additional information on the scoring criteria.

The Development Evaluation System Score Sheet

This is the actual worksheet that will be completed by the project planner and provided to the applicant after each time their respective project has been evaluated under the DES.

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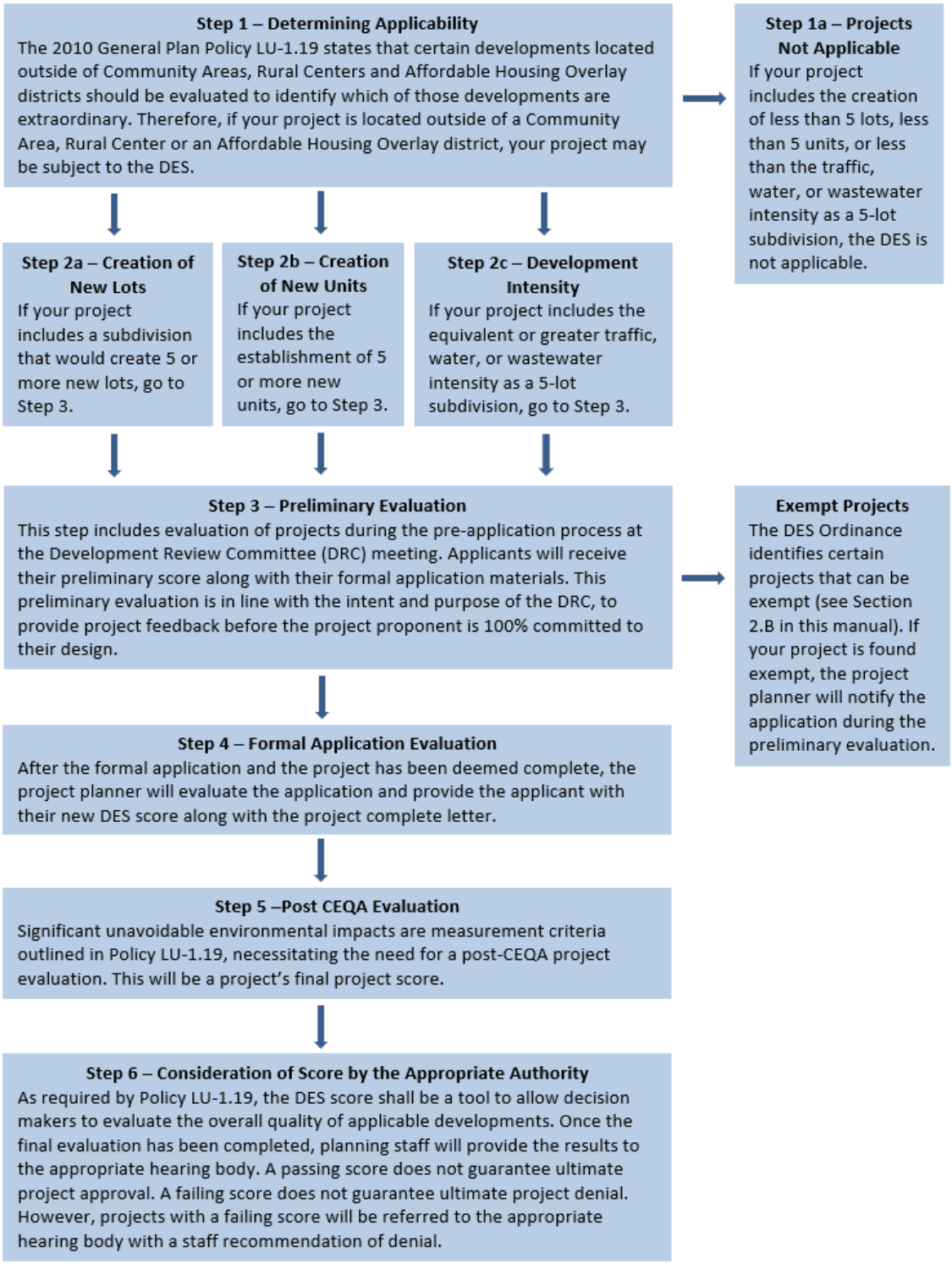
C. Summary of the DES Process

The flowchart below provides a general guideline for applicants, illustrating the DES process for submittal, review/evaluation and final scoring of projects subject to the DES Ordinance:



SECTION 2 – APPLICABILITY

The DES Ordinance is intended to govern certain developments located outside of the following development priority areas: Community Areas, Rural Centers and Affordable Housing Overlay districts. Projects located outside of these areas that exceed the thresholds listed in Subsection A below are subject to the evaluation under the DES.

A. Development Thresholds

The DES applicability thresholds for development are as follows:

- Subdivisions which create 5 or more new lots.
- Projects that establish 5 or more new units.
- Projects that would have traffic, water, or wastewater intensity that would be equal to or greater than the establishment of 5 or more lots/units.
    - Applicability of this threshold will be determined by the Environmental Health Bureau for water and wastewater and/or by Public Works for traffic.
    - If a project proponent disagrees with the threshold determination, they may appeal pursuant to Chapter 21.82 of the Monterey County Code. In that case, the applicant shall submit a report prepared by a qualified professional that compares project related impacts with professional standards set for thresholds for water, wastewater, and/or traffic, whichever is applicable to the appeal.

B. Exempt Projects

There are specific development projects that could qualify for and exemption from the DES. In order for projects to be found exempt from the DES, they shall meet **ALL** portions of a 3-part test; development type, measurement criteria and assurance mechanism. The 3 types of specific developments are discussed below, including their respective measurement criteria and assurance mechanism. See ***Subsection 1*** for subdivisions exclusively for agricultural purposes; ***Subsection 2*** for long-term affordable housing exclusively for agricultural employees, and ***Subsection 3*** for certain developments within the Agricultural and Winery Corridor Plan area.

1. Subdivisions Exclusively for Agricultural Purposes

As specified in the DES Ordinance, projects may be exempt from the DES if the subdivision is for one of the Development Types listed in ***Subsection 1a***, meets the Measurement Criteria listed in ***Subsection 1b***, and includes the Exemption Assurance Mechanism listed in ***Subsection 1c***.

Subsection 1a. Development Types for Subdivisions Exclusively for Agricultural Purposes

Exempt projects shall be exclusively for **ONE OR MORE** of the following:

- the separation of existing vineyard/crop land(s) from an existing winery/processing facility.
- the separation of different varietals, crops, or orchards for finance and/or lending purposes.
- the separation of existing lands farmed by owners from lands farmed by lessees.
- the separation of agricultural lands for estate purposes to provide individual family members a unique property to continue the existing agricultural use.
- The following

Subsection 1b. Measurement Criteria for Subdivisions Exclusively for Agricultural Purposes

To ensure projects are consistent with the purpose and intent for establishing the exemption, the application shall be required to meet **ALL** of the applicable following measurement criteria:

- Review and recommendation by the Agricultural Advisory Committee (AAC). The project must receive a recommendation for exemption from the AAC in order to be eligible for exemption from the DES.
- Acreage of lots resulting from the subdivision is equal or greater than the minimum lot size for viable agricultural use and as prescribed by zoning.
- Proposed uses incorporated in the project are restricted to only those that support, maintain and/or enhance the existing viable agricultural use of the property.

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- Proposed improvements on the subject property are located in areas that will have minimal impact on productive land.

Subsection 1c. Assurance Mechanism for Subdivisions Exclusively for Agricultural Purposes

To fully qualify for an exemption from the DES, projects shall be conditioned to record either a Deed Restriction or a Conservation Easement against the subject property to ensure the development type which qualified for the exemption does not change through the life of the project. The deed or easement shall include the following:

- Project description;
- A clear statement indicating that lot sizes resulting from future subdivisions shall be equal or greater than the minimum lot size for viable agricultural use;
- A clear statement indicating that future uses on the property shall be limited to those that support, maintain and/or enhance the existing viable agricultural use of the property;
- A clear statement describing the property(ies) associated with the project are subject to the Deed Restriction or Conservation Easement for the life of the permit; and
- A clear statement indicating that removal of any or all restrictions shall require an amendment to the discretionary permit.

2. Long-term Affordable Housing Exclusively for Agricultural Employees

As specified in the DES Ordinance, long-term affordable housing exclusively for agricultural employees projects may be exempt from the DES if it meets the Measurement Criteria listed in ***Subsection 2a*** and includes the Exemption Assurance Mechanism listed in ***Subsection 2b***.

Subsection 2a. Measurement Criteria for Long-term Affordable Housing Exclusively for Agricultural Employees.

To ensure projects are consistent with the purpose and intent for establishing the exemption, the application shall be required to meet **ALL** of the applicable following measurement criteria:

- Review and recommendation by the Agricultural Advisory Committee (AAC). The project must receive a recommendation for exemption from the AAC in order to be eligible for exemption from the DES.
- The long-term affordable housing exclusively for agricultural employees shall:
    - Meet the affordability qualifications set forth in section 21.06.005 of the Monterey County Code;
    - Meet the definition of agricultural employee housing as defined in section 21.06.014 of the Monterey County Code; and
    - Provide housing for agricultural employees as defined in section 21.06.012 of the Monterey County Code.

Subsection 2b. Assurance Mechanism Long-term Affordable Housing Exclusively for Agricultural Employees.

To fully qualify for an exemption from the DES, projects shall be conditioned to record a Deed Restriction conveyed over the subject property and/or enter into an affordable housing agreement. To ensure the development that qualified for the exemption does not change through the life of the project, the deed or agreement shall include the following:

- Project description;
- A clear statement that future uses on the property are limited to those that support, maintain and/or enhance the long-term affordable housing exclusively for agricultural employees established on the property;
- A clear statement describing the property(ies) associated with the project are subject to the Deed Restriction and/or affordable housing agreement for the life of the permit; and
- A clear statement indicating that removal of any or all restrictions prior to the sunset date shall require an amendment to the discretionary permit.

3. Development within the Agricultural and Winery Corridor Plan (AWCP) Area

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As specified in the DES Ordinance, certain projects within the AWCP area may be exempt from the DES if the subdivision is for one of the Development Types listed in ***Subsection 3a***, meets the Measurement Criteria listed in ***Subsection 3b***, and includes the Exemption Assurance Mechanism listed in ***Subsection 3c***.

Subsection 3a. Development Types within AWCP Area

As specified in the DES Ordinance, development within the Agricultural and Winery Corridor Plan (AWCP) area may be exempt from the DES if it is for **ONE OR MORE** of the following listed below, provided the development type does not exceed the facility limitations prescribed by the AWCP:

- Artisan Wineries
- Full-scale Wineries
- Winery Tasting Rooms
- Food Service Facilities such as Restaurants and Delicatessens
- Inns

Subsection 3b. Measurement Criteria for Developments within the AWCP Area

To ensure projects are consistent with the purpose and intent for establishing the exemption, the application shall be required to meet **ALL** of the applicable following measurement criteria:

- Review and recommendation by the Agricultural Advisory Committee (AAC). The project must receive a recommendation for exemption from the AAC in order to be eligible for exemption from the DES.
- Demonstrate that development type does not exceed the facility limitations prescribed by the AWCP.
- Demonstrate that the development proposed meets the General Regulations, Development Standards, and Design Guidelines established in the AWCP.

Subsection 3c. Assurance Mechanism for Developments within the AWCP Area

To fully qualify for an exemption from the DES, projects shall be conditioned to record a Deed Restriction against the subject property to ensure the development type which qualified for the

exemption does not change through the life of the project. The deed or easement shall include the following:

- Project description;
- A clear statement describing the property(ies) associated with the project are subject to the Deed Restriction or Conservation Easement for the life of the permit; and
- A clear statement indicating that removal of any or all restrictions shall require an amendment to the discretionary permit.

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SECTION 3 – PROJECT EVALUATION

A. Evaluation Milestones

Projects subject to the DES will be evaluated at 3 different milestones in the permit process. This provides applicants with the opportunity to explore potential modifications to their projects that would increase their overall scores. It also allows re-evaluation of projects based on milestones that typically provide more information through analysis. Theoretically, project scores could fluctuate between passing and failing scores throughout the entire evaluation process. The 3 evaluation milestones include:

- Preliminary DRC Evaluation – This preliminary evaluation will take place during the Development Review Committee (DRC) stage. After the DRC meeting, the applicant will be provided with the project's preliminary DES scores along with their formal permit application package. This provides the project proponent with an opportunity to determine if their development is subject to the DES (see Sections 2.A and 2.B above). It will also identify positive and negative project components which would affect the DES score, allowing for project modifications and improvements before the applicant is 100% committed to their design.
- Formal Project Application Evaluation – Once the formal application is submitted, the project planner will evaluate the development once more through the DES Score Sheet. The Formal Project Application DES score will be provided to the applicant along with the project complete letter, when the project is deemed "Complete" pursuant to the Permit Streamline Act.
- Post CEQA Analysis Evaluation – Often times, additional information is revealed during a project's environmental review under the California Environmental Quality Act (CEQA). Project components which have a significant unavoidable impact to the environment are identified at this time, and are included as required measurement criteria in the DES Scoresheet. Points may be subtracted for certain impacts, so unavoidable impacts may change the DES score that was given prior to CEQA analysis. The post-CEQA evaluation will be the final project score and presented to the appropriate authority for consideration.

B. Evaluation Criteria

As required by Policy LU-1.19 and the DES Ordinance, projects subject to the DES shall be measured by their impacts (positive or negative) on certain criteria: affordable housing, infrastructure, resource management, site suitability, balance of uses, traffic and proximity to transportation, and environmental impacts. The criteria above are listed in priority order established through the combination of public outreach meetings and as directed by the Monterey County Planning Commission. Positive impacts will receive positive scores. Maximum allowable points for each respective criteria have been applied based on their priority weights. This evaluation does not provide a sliding scale for receiving points; meaning, points are either awarded in full or not at all. Therefore, the applicant should pay special attention to how their project could qualify for points and make sure the proper evidence/documentation (see section 3.D of this manual) is provided with the DES package. Also see the Development Evaluation System Score Sheet Guide provided in Appendix C of this manual. The following is a summary of the criteria that projects are measured by:

1. Affordable Housing

This section focuses on projects that provide affordable housing beyond the minimum amount required by County Code. Points would be awarded for projects that provide both onsite and offsite affordable units, rehabilitation of dilapidated affordable units, and providing transitional housing to the homeless or veterans. There are 7 different affordable housing questions and a total score of 30 points is the maximum a project can receive in this category.

2. Infrastructure

This section focuses on projects that improve existing infrastructure, including components that would reduce traffic, provide onsite recreational opportunities in excess of the minimum requirement, and/or provide onsite public amenities. There are 6 different infrastructure questions and a total score of 25 points is the maximum a project can receive in this category.

3. Resource Management

This section focuses on projects that voluntary restore/rehabilitate and/or conserve/preserve resources such as water, environmentally sensitive habitat areas, scenic resources, and/or agricultural soils. Points can also be received for those project that include a renewable energy component. There are 4 different resource management questions and a total score of 15 points is the maximum a project can receive in this category.

4. Site Suitability

This section focuses on projects that site and design developments so that they are subordinate to the natural setting of the surrounding area and avoid development on slopes in excess of 25%, tree removal, and major vegetation removal. Points can also be received for infill development and in areas that do not have known geological hazards. There are 3 different site suitability questions and a total score of 10 points is the maximum a project can receive in this category.

5. Balance of Uses

This section focuses on projects that provide a mix of uses such as commercial uses, housing, and employment opportunities. There are 4 different mix/balance of use questions and a total score of 10 points is the maximum a project can receive in this category.

6. Traffic and Proximity to Transportation

This section focuses on projects that reduce traffic, or are located near alternative transportation opportunities such as transit service (bus) and/or bicycle and/or pedestrian facilities. There are 4 different transportation questions and a total score of 10 points is the maximum a project can receive in this category.

7. Environmental Impacts

Many of the criteria listed above could be considered mitigation of impacts by design of the project. Therefore, this section focuses on significant unavoidable impacts to the environment. Environmental Impacts is the only category where projects cannot receive points but rather could be subject to subtraction of points. Following environmental review, projects with a significant

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unavoidable impact to agriculture and forest resources, air quality, greenhouse gas emissions, biological resources, hydrology and water quality, growth inducement, land use planning, traffic, and/or wildfires would be penalized by subtraction of 10 points for each respective section; with a maximum of 90 points subtracted. However, please note that it is unlikely that a project would have significant unavoidable impacts to all of these resources.

C. Supporting Documentation and Assurances

In order for projects to receive scores, applicants must submit evidence that demonstrates or identifies how project components positively impact one of the defined criteria. Depending on the criteria, projects may also be conditioned to ensure that a particular project component is provided and maintained through the life of the development.

For example, fictional developer "Affordable Housing, LLC" proposes a development project consisting of a 50-lot subdivision, construction of 120 residential units, a neighborhood park, a fire/sheriff substation with a community room and the installation of 3 new bus stops. The inserts below discuss how points would be given and illustrates the types supporting documentation the developer would have to provide and the assurances, conditions of approval, they would have to agree to.

Example 1 – Affordable Housing. *The project scope indicates that 54% of 120 residential units are proposed as affordable. Question 1.a. of the DES states that a project would receive 2 points if 45% or more of residential units would remain affordable in perpetuity AND the application materials includes a lotting exhibit identifying the affordable residential units, a draft inclusionary housing agreement, and a draft deed restriction. A condition of approval would be applied to the project requiring recordation of the final inclusionary housing agreement and recordation of a deed restriction.* ***The project would receive 2 points****.*

Example 2 – Infrastructure, Recreation. *The project scope includes construction of a neighborhood park to provide recreational benefits to the residents of the community. The acreage of the park meets the exact the minimum requirements set forth in the 1975 Quimby Act. Question 2.b. of the DES states that a project would receive 4 points if onsite recreational opportunities are provided beyond 10% of the minimum requirements of the Quimby Act.* ***The project would not receive any points.***
Example 3 – Infrastructure, Public Amenities. *The project scope includes construction of a fire station and sheriff substation. The building includes a community room that would be open to use by the residents of the community. Question 2.c. of the DES states that a project would receive 5 points if onsite public amenities are provided in an area where such amenities are not easily accessible to the community AND the application materials include a site plan(s) delineating where onsite public facilities are proposed and a map identifying the location of nearest existing amenities and demonstrating how they are not easily accessible.* ***The project would receive 5 points.***
Example 4 – Transportation and Proximity to Transportation. *The project scope indicates that transit service in the area would be improved by the addition 3 new bus stops in the development. Question 6.a. of the DES states that a project would receive 4 points if it provides or improves transit service in an area where bus routes do not exist or access is limited AND the application materials includes include a site plan(s) delineating the locations of the proposed bus stops, documentation identifying locations of existing transit routes and service schedule within the project area, and a can and will serve letter from Monterey-Salinas Transit indicating that the additional service stops are feasible and transit service will be provided.* ***The project would receive 4 points.***

For additional information, the Development Evaluation System Scoresheet guide can be found in Appendix C of this manual.

D. Score Sheet

As discussed in Section 3.A of this Manual, projects subject to the DES will be evaluated at 3 major milestones in the permit process: the preliminary evaluation, formal application evaluation, and post CEQA evaluation. During these evaluations, staff will use the DES System Scoresheet (see Appendix D) to score the project's impacts (positive or negative) on the specific criteria areas, subject to evidence/documentation submitted by the applicant. This tool is intended to memorialize a project's score throughout the permit process but also serve to inform the project application of potential opportunities to gain additional points by modifying their project.

SECTION 4 – RESULTS FOR HEARING BODY

A. Scores Presented to the Appropriate Authority

The intent of General Plan Policy LU-1.19 is to provide a mechanism to quantitatively evaluate development in light of the policies of the General Plan and the implementing regulations, resources and infrastructure, and the overall quality of the development. As specified by the above policy and codified in the DES Ordinance, the Development Evaluation System shall provide a systematic, consistent, predictable, and quantitative method for decision-makers to evaluate applicable developments alongside all other information provided through the discretionary process.

As such, a project's final score, along with a determination of "pass" or "fail" will be provided to the appropriate authority for their consideration. The DES score is supplemental to the findings and evidence supporting either a recommendation of approval or denial as required by applicable County land use regulations. Decision makers will be asked to consider the outcome of the DES as part of the overall discretionary hearing process.

B. How Does Your DES Score Affect Your Project?

Projects to which the DES applies will require discretionary approval. Therefore, a project's DES score is intended to provide a supplemental evaluation for identifying qualities of certain developments in addition to the standard protocols for project review of discretionary permits. In other words, the DES is intended to be a tool serving two purposes in the discretionary decision process: 1) allow staff an opportunity to quantitatively and constructively advise the applicant of the development's overall quality through the entire permit process and 2) provide a tool for the hearing body to assess the critical aspects of a project against the policies of the 2010 General Plan. Since the permit process is discretionary in nature, projects that receive a passing score are not necessarily guaranteed approval and projects that receive a failing score are not necessarily guaranteed denial. Projects with a failing score shall be referred to the appropriate hearing body with a staff recommendation of denial.

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APPENDIX A

GLOSSARY

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“Affordable Housing Overlay District” means areas designated as Affordable Housing Overlay Districts as specified in 2010 General Plan Policy LU-2.11.a and properties designated as Affordable Housing Overlay District in accordance with 2010 General Plan Policy LU-2.11.b

“Agricultural Advisory Committee (AAC)” means the committee that advises and makes recommendations to the Monterey County Board of Supervisors, and other county boards, commissions and departments, on matters affecting, or of interest to, the agricultural industry.

“California Environmental Quality Act (CEQA)” refers to State law requiring environmental review of land use projects (Public Resources Code section 21000 et seq.).

“Cluster Development” means a development design where the structures or lots or structures and lots are located on a portion of the land to be developed rather than spread throughout the land.

“Community Area” means areas designated as Community Areas as specified in 2010 General Plan Policy LU-2.21.

“Conservation” means planned management of natural resources to prevent waste, destruction, or neglect.

“Infill” means development of unused, vacant, underutilized, or undeveloped land that is substantially surrounded by other urban uses.

“Mixed-Use” means a development incorporating a range of diverse uses, such as office, commercial, institutional, and residential, into a single building or complex.

“Off-site” means off the lot on which the development is proposed.

“On-site” means on the lot on which the development is proposed.

“Preservation” means the use of long-term or permanent safeguards to guarantee the viability of natural or man-made resources.

“Rural Center” means areas designated as Rural Centers as specified in 2010 General Plan Policy LU-2.27.

“Transitional Housing” means a project that has as its purpose facilitating the movement of homeless individuals and families to permanent housing within a reasonable amount of time (usually 24 months). Transitional housing includes housing primarily designed to serve deinstitutionalized homeless individuals and other homeless individuals with mental or physical disabilities and homeless families with children.

“Workforce Housing” means housing that is priced where it is affordable to households earning between 120%-180% of the County median income. Workforce I means housing that is priced where it is affordable to households earning between 120%-150% of the County median income

Workforce II means housing that is priced where it is affordable to households earning between 150%-180% of the County median income.

“Winery, Artisan” means a winery that produces between 2,000 and 50,000 cases per year, with a Winery Tasting Facility up to 2,500 square feet in size.

“Winery, Full-Scale” means a winery that produces more than 50,000 cases per year.

“Winery Tasting Facility” means a bonded Winery Tasting Facility, also known as an "on or off winery premise,” as provided by federal law under the jurisdiction of the Tax and Trade Bureau. A Winery Tasting Facility shall accommodate wine tasting, an administrative office, retail sales of associated wine and wine related items, events, warehousing, and storage. Winery Adjunct Uses may be considered as accessory to a Winery Tasting Facility when specifically requested and addressed as part of the discretionary permit application for the Winery Tasting Facility or as a subsequent permit application process.

“Viable Agricultural Use” means the ability of a farmer of group of farmers to productively farm on a given piece of land or in a specific area, maintain an economically viable farm business, keep the land in agriculture long-term, and steward the land so it will remain productive into the future.

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APPENDIX B

DES PACKAGE SUBMITTAL FORM

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MONTEREY COUNTY
RESOURCE MANAGEMENT AGENCY
DEVELOPMENT EVALUATION SYSTEM PACKAGE SUBMITTAL FORM

The following is a checklist of materials required for submittal of your Development Evaluation System (DES) package. Two (2) hardcopies of all materials are required. Plans shall be drawn on a sheet sized large enough to have legible fonts and line weights. An electronic copy (pdf.) of all submitted materials is also required to be submitted on CD or flash-drive.

PROJECT INFORMATION		PERMIT NO.
SITE ADDRESS	CITY/STATE	ZIP
NEAREST CROSS-STREET	ASSESSOR'S PARCEL NUMBER(S)	

OWNER(S) INFORMATION		
NAME	PHONE	
MAILING ADDRESS	CITY/STATE	ZIP
FAX	EMAIL	

APPLICANT INFORMATION		
NAME	PHONE	
MAILING ADDRESS	CITY/STATE	ZIP
FAX	EMAIL	

PROJECT INFORMATION	
PROJECT TYPE (RESIDENTIAL, NON-RESIDENTIAL, OR COMBINED)	
ESTIMATED WATER USE	ESTIMATED WASTEWATER PRODUCED
ESTIMATED TRAFFIC TO BE GENERATED	

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EVIDENCE/DOCUMENTATION: Check the appropriate box below for applicable measurement criteria and list the evidence/documentation provided:		
Applicable Measurement Criteria		**Evidence and/or Documentation Submitted**
☐	**Affordable Housing**	
☐	**Infrastructure**	
☐	**Resource Management**	
☐	**Site Suitability**	
☐	**Balance of Uses**	
☐	**Traffic and Proximity to Transportation**	
☐	**Environmental Impacts**	

Owner Signature: _____ Date: _____

Applicant Signature:_____ Date: _____

FOR DEPARTMENT USE ONLY		
RECEIVED BY:	DATE STAMP:	ALL THE REQUIRED MATERIAL WERE SUBMITTED: __ YES __ NO

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APPENDIX C

DEVELOPMENT EVALUATION SYSTEM SCORSHEET GUIDE

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MONTEREY COUNTY
RESOURCE MANAGEMENT AGENCY
Carl P. Holm, AICP, Director

LAND USE & COMMUNITY DEVELOPMENT | PUBLIC WORKS & FACILITIES | PARKS
1441 Schilling Place, South 2nd Floor (831)755-4800
Salinas, California 93901-4527 www.co.monterey.ca.us/rma

This Score Sheet Guide is intended to assist with understanding how projects are evaluated under the DES. Scoring criteria is separated into individual categories to allow for weighted scoring. The guide includes 4 columns for each criteria section. The second column identifies the standard/project component a development must contain to qualify for points. The third column identifies evidence an applicant must submit to receive points as well as any required conditions of approval an applicant must agree to. The last column identifies the amount of points that can be awarded. Points are either awarded in full or not at all. This guide should be used in conjunction with the DES Score Sheet.

1	AFFORDABLE HOUSING	EVIDENCE/DOCUMENTATION	POINTS POSSIBLE
a	45% or more of residential units provided are affordable and will remain as affordable in perpetuity. (7% Very Low, 8% Low, 15% Moderate & 15% Workforce 1)	Provide a lotting exhibit identifying affordable residential units, a draft inclusionary housing agreement, and a draft deed restriction. Projects receiving a score for this criteria shall be conditioned requiring recordation of the final inclusionary housing agreement and deed restriction prior to recordation of a final map or commencement of development, whichever occurs first.	2
b	More than 10% of residential units are sited and designed to meet ADA Accessibility requirements.	Provide a lotting exhibit identifying ADA accessible units.	4

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1	AFFORDABLE HOUSING	EVIDENCE/DOCUMENTATION	POINTS POSSIBLE
c	The project provides transitional affordable housing for the homeless.	Provide a lotting exhibit identifying transitional housing units and draft housing agreement. Projects receiving a score for this criteria shall be conditioned requiring recordation of the final housing agreement prior to recordation of a final map or commencement of development, whichever occurs first.	5
d	The project provides transitional affordable housing for veterans.	Provide a lotting exhibit identifying transitional housing units and a draft housing agreement. Projects receiving a score for this criteria shall be conditioned requiring recordation of the final housing agreement prior to recordation of a final map or commencement of development, whichever occurs first.	5
e	The project provides a mix of housing types (detached single family dwellings, multi-family units, accessory dwelling units, owner-occupied units, and renter-occupied units).	Provide a lotting exhibit identifying all housing types provided, including square footages of unit types and a draft housing agreement. Projects receiving a score for this criteria shall be conditioned requiring recordation of the final housing agreement prior to recordation of a final map or commencement of development, whichever occurs first.	5
f	The project includes rehabilitation of existing affordable housing units.	Provide evidence documenting the location and amount of existing affordable housing units and demonstrating the need for their rehabilitation. Preliminary construction plans illustrating how rehabilitation shall occur shall also be submitted. Projects receiving a score for this criteria shall be conditioned requiring recordation of the final inclusionary housing agreement (if a previous agreement is no longer valid) prior to recordation of a final map or commencement of development, whichever occurs first. The agreement shall stipulate that the units shall remain affordable in perpetuity.	5

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1	AFFORDABLE HOUSING	EVIDENCE/DOCUMENTATION	POINTS POSSIBLE
g	The project includes payment of in-lieu inclusionary housing fees equal to or greater than 45% of the market rate units for the project. OR The project includes construction of off-site inclusionary housing within a Community Area or Rural Center, equal to or greater than 45% of the market rate units for the project.	Provide a draft inclusionary housing agreement identifying the payment of inclusionary housing fees or off-site affordable units. Projects receiving a score for this criteria shall be conditioned requiring recordation of the final inclusionary housing agreement prior to recordation of a final map or commencement of development, whichever occurs first.	4
		TOTAL POINTS POSSIBLE FOR THIS CATEGORY:	**30**

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2	INFRASTRUCTURE	EVIDENCE/DOCUMENTATION	POINTS POSSIBLE
a	The project includes improvement of existing infrastructure, beyond the minimum required, in an area where current residents are experiencing significant infrastructure deficiencies and/or problems.	Provide report prepared by the appropriate qualified professional, based on the type of infrastructure, identifying existing infrastructure and demonstrating how said infrastructure is deficient. The report shall describe how infrastructure improvements resolve the deficiencies. Projects receiving a score for this criteria shall be conditioned requiring submittal of final infrastructure improvement plans and an accompanying operations and maintenance plan (OMP) prior to recordation of a final map or commencement of development, whichever occurs first. The OMP shall provide define responsibilities, priorities and activities for maintenance of project infrastructure facilities. Additionally, the OMP shall identify mechanisms available to fund operations and maintenance of these facilities.	5
b	The project includes onsite recreational opportunities beyond 10% of the minimum requirements set forth in the 1975 Quimby Act (Government Code Section 66477).	Project plans shall delineate where onsite recreational opportunities will be located. Evidence comparing the project's Quimby Act recreation requirements with the recreation opportunities provided shall be submitted. Projects receiving a score for this criteria shall be conditioned requiring submittal of a final parks and recreation plan and an accompanying operations and maintenance plan (OMP) prior to recordation of a final map or commencement of development, whichever occurs first. The OMP shall provide define responsibilities, priorities and activities for maintenance of project recreation facilities. Additionally, the OMP shall identify mechanisms available to fund operations and maintenance of these facilities.	4

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2	INFRASTRUCTURE	EVIDENCE/DOCUMENTATION	POINTS POSSIBLE
c	The project includes providing onsite public amenities, including but not limited to: libraries, community-use buildings, community gardens, hiking trails, and open space in an area where such amenities are not easily accessible to the community.	Project plans shall delineate where onsite public facilities will be located. Evidence shall document where the nearest existing amenities are located and demonstrate how they are not easily accessible. Projects receiving a score for this criteria shall be conditioned requiring submittal of final construction plans for the onsite public amenities and an accompanying operations and maintenance plan (OMP) prior to recordation of a final map or commencement of development, whichever occurs first. The OMP shall provide define responsibilities, priorities and activities for maintenance of the onsite public amenities. Additionally, the OMP shall identify mechanisms available to fund operations and maintenance of these facilities.	5
d	The project includes waste diversion program that includes recycling and composting and the reduction of waste hauler trips.	Provide a waste diversion program demonstrating how the program will reduce waste and as well as reduce the amount of waste hauler trips that would occur within the program. Projects receiving a score for this criteria shall be conditioned requiring submittal of a final waste diversion program prior to recordation of a final map or commencement of development, whichever occurs first. The final plan shall include an implementation component and contingency plan(s) if the program is not successful.	3

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2	INFRASTRUCTURE	EVIDENCE/DOCUMENTATION	POINTS POSSIBLE
e	The project will not result in decreasing the existing level of service/service standards identified in Table PS-1 of the 2010 General Plan for road intersection level of service, water, sanitation, solid waste, and schools serving the project area.	Project plans shall delineate all existing infrastructure. Report(s) prepared by an appropriate qualified professional, based on the type of infrastructure, identifying existing infrastructure and its current level or serve/service standards shall be submitted with the application. The report shall describe how project implementation would not decrease the existing level of service/service standards of the existing infrastructure. Conclusions contained in the report shall be supported by empirical evidence.	3
f	The project provides critical emergency infrastructure and services such as fire stations, sheriff substations, emergency service stations, clinics, or hospitals within a deficient area.	Project plans shall delineate where onsite critical infrastructure and services will be located. Evidence shall document where the nearest existing critical infrastructure and services are located and demonstrate how they are not easily accessible and/or the established response times.	5
		TOTAL POINTS POSSIBLE FOR THIS CATEGORY:	**25**

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3	RESOURCE MANAGEMENT	EVIDENCE/DOCUMENTATION	POINTS POSSIBLE
a	The project includes groundwater recharge facilities.	Provide a geotechnical report and preliminary plans for stormwater retention/detention facilities prepared by a licensed civil engineer. These documents shall demonstrate how the facility will recharge the groundwater. Projects receiving a score for this criteria shall be conditioned requiring submittal of final construction plans and an accompanying operations and maintenance plan (OMP) prior to recordation of a final map or commencement of development, whichever occurs first. The OMP shall define responsibilities, priorities and activities for maintenance of project groundwater recharge facilities. Additionally, the OMP shall identify mechanisms available to fund operations and maintenance of these facilities.	3
b	The project includes restoration/rehabilitation of environmentally sensitive habitat areas (ESHA) and provides for the long-term maintenance of these areas.	Provide a restoration plan and biological report, prepared by a qualified biologist. The plan and report shall clearly delineate areas of degraded ESHA, restoration activities required, and address the long-term maintenance of the ESHA. Projects receiving a score for this criteria shall be conditioned requiring submittal of final restoration plans reviewed and approved by a qualified biologist prior to recordation of a final map or commencement of development, whichever occurs first. Prior to final of construction permits, the applicant shall demonstrate successful restoration of the degraded ESHA through a report prepared by the project biologist.	3

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3	RESOURCE MANAGEMENT	EVIDENCE/DOCUMENTATION	POINTS POSSIBLE
c	The project includes the voluntary conservation/preservation of unique visual or natural features, critical habitat, or prime agricultural soils through conveyance of a conservation easement from the property owner to either the County of Monterey, an appropriate public entity, or a non-profit public benefit corporation.	Provide a draft easement with the application. Projects receiving a score for this criteria shall be conditioned requiring acceptance and recordation of the easement prior to recordation of a final map or commencement of development, whichever occurs first.	3
d	The project includes an onsite renewable energy component that will supply energy to the proposed development.	Provide plans identifying where proposed onsite renewable energy facilities will be located. Projects receiving a score for this criteria shall be conditioned requiring submittal of either subdivision improvement plans or final construction plans delineating onsite renewable energy facilities as well as proof of purchase or a rental agreement for the onsite renewable energy facilities prior to recordation of a final map or issuance of construction permits for the proposed development, whichever occurs first. Prior to final of construction permits for the development, the applicant shall submit either an Inter-connection Agreement with PG&E or proof of installation of the onsite renewable energy facilities.	3
e	The project has no impact to nearby resources.	Provide a report, prepared by a qualified professional, demonstrating implementation of the project would have no impact to nearby resources (e.g. water, biology, air quality) or as demonstrated in the CEQA document prepared for the project.	3
		TOTAL POINTS POSSIBLE FOR THIS CATEGORY:	**15**

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4	SITE SUITABILITY	EVIDENCE/DOCUMENTATION	POINTS POSSIBLE
a	The development is sited and designed to be subordinate to the natural setting of the subject property and surrounding area. The project avoids development on slopes in excess of 25%, tree removal, major vegetation removal, development in the floodplain, and ridgeline development.	Project plans submitted with the application shall show constraint areas (i.e. slopes, ESHA, scenic areas, etc.) of the property and demonstrate how development avoids disturbance these areas.	5
b	The development includes infill of vacant non-agricultural lands within existing developed areas and is compatible with surrounding land use and development.	Project plans submitted with the application shall show the developed areas surrounding the project site illustrating how the project is infill development. The application shall include a compatibility analysis comparing the existing surrounding development with the proposed project.	3
c	The subject property is not located within a landslide area or areas showing evidence of ground movement within historic times, within 50 feet of the face of a cliff or bluff, within 1/8th mile of an active or potentially active fault, or in any area of known geologic hazards.	A geotechnical report, prepared by a qualified professional, shall be submitted with the project application demonstrating the project area does not show evidence of the geological hazards listed.	2
		TOTAL POINTS POSSIBLE FOR THIS CATEGORY:	**10**

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5	BALANCE OF USES	EVIDENCE/DOCUMENTATION	POINTS POSSIBLE
a	The project includes industrial, commercial, and/or agriculturally industrial development, consistent with the underlying zoning of the property, and provides employee housing rental units for employees employed onsite.	Provide preliminary project plans that identify locations of the industrial, commercial, and/or agriculturally industrial development as well as the employee housing units. Provide a draft General Development Plan (GDP) identifying and describing the industrial, commercial, and/or agriculturally industrial operations proposed. The GDP shall include an employee housing plan containing a list of full-time employees and the employee housing units provided. Projects receiving a score for this criteria shall be conditioned requiring recordation of an employee housing agreement consistent with the employee housing plan prior to recordation of a final map or commencement of development, whichever occurs first.	4
b	The project includes mixed-use development that provides commercial uses that serves the needs of the community.	Provide preliminary project plans delineating the proposed mixed-use development (such as residential, commercial, and industrial uses). In addition, the application shall include a General Development Plan (GDP) identifying and describing different uses on the site.	3
c	The project provides housing in an area with an established employment concentration but lacks available housing. OR The project includes industrial, commercial, and/or agriculturally industrial development, consistent with the underlying zoning of the property, within an area where there is an established workforce to support the proposed use.	Provide evidence documenting the location(s) of employment centers, the proximity of the project area to these centers, and the lack of available housing. Or, provide evidence documenting the location(s) of existing workforce in proximity of the project area.	3
		TOTAL POINTS POSSIBLE FOR THIS CATEGORY:	**10**

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6	TRAFFIC AND PROXIMITY TO TRANSPORTATION	EVIDENCE/DOCUMENTATION	Points Possible
a	The project provides or improves transit service in an area where bus routes do not exist or access is limited. This includes, but is not limited to: construction of bus stops, re-routing of buses, or the increase of bus service and stops.	Application plans shall include documentation identifying locations of existing transit routes, stops, and service schedule within the project area. If new service/stops are proposed, a letter (can and will serve) from MST indicating that their additional service is feasible shall be provided. Project plans shall identify where any new bus stops will be located.	4
b	The project is located within ½ mile of an existing bus stop with sufficient amount of service and stops to serve the development.	Application plans shall include documentation identifying locations of existing transit routes, stops, and service schedule within the project area.	2
c	The project includes construction of bicycle and pedestrian facilities that connect to existing facilities.	Application plans shall include documentation identifying locations of existing bicycle and pedestrian facilities closest to the project area. Project plans shall include on-site and off-site improvements plans showing the location and design details of the proposed facility. For off-site improvements, additional information such as easements or agreements from property owners documenting that they will allow facility improvements on their respective properties shall be provided.	2

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d	The project includes a traffic reduction plan for project related traffic.	Provide a traffic analysis and traffic reduction strategy prepared by a qualified professional. The report shall compare baseline traffic with project traffic conditions, provide evidence and methodology supporting the conclusions in the traffic reduction plan, and identify feasibility of plan implementation. Projects receiving a score for this criteria shall be conditioned requiring submittal of final construction plans of any new traffic facilities incorporated within the traffic reduction plan and an accompanying operations and maintenance plan (OMP) prior to recordation of a final map or commencement of development, whichever occurs first. The OMP shall provide define responsibilities, priorities and activities for maintenance of project traffic facilities. Additionally, the OMP shall identify mechanisms available to fund operations and maintenance of these facilities.	2
		TOTAL POINTS POSSIBLE FOR THIS CATEGORY:	**10**

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7	ENVIRONMENTAL IMPACTS	EVIDENCE/DOCUMENTATION	POINTS DEDUCTED
a	Agriculture and Forest Resources	Prepared Environmental Document (e.g.: EIR)	Minus 10 points for impacts(s) are significant unavoidable
b	Air Quality	Prepared Environmental Document (e.g.: EIR)	Minus 10 points if impacts(s) are significant unavoidable
c	GHG Emissions	Prepared Environmental Document (e.g.: EIR)	Minus 10 points if impacts(s) are significant unavoidable
d	Biological Resources	Prepared Environmental Document (e.g.: EIR)	Minus 10 points if impacts(s) are significant unavoidable
e	Hydrology & Water Quality	Prepared Environmental Document (e.g.: EIR)	Minus 10 points if impacts(s) are significant unavoidable
f	Growth Inducement	Prepared Environmental Document (e.g.: EIR)	Minus 10 points if impacts(s) are significant unavoidable
g	Land Use Planning	Prepared Environmental Document (e.g.: EIR)	Minus 10 points if impacts(s) are significant unavoidable
h	Traffic	Prepared Environmental Document (e.g.: EIR)	Minus 10 points if impacts(s) are significant unavoidable
i	Wildfires	Prepared Environmental Document (e.g.: EIR)	Minus 10 points if impacts(s) are significant unavoidable
TOTAL DEDUCTION OF POINTS POSSIBLE FOR THIS CATEGORY:			**-90**

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APPENDIX D

DEVELOPMENT EVALUATION SYSTEM SCORESHEET

	SCORING CRITERIA	EVIDENCE/DOCUMENTATION	SCORE
1	**Affordable Housing**		
a	45% of residential units provided are affordable and will remain as affordable in perpetuity. (30 % Inclusionary & 15% Workforce)		☐ 2 ☐ 0
b	More than 10% of residential units sited and designed to meet ADA Accessibility requirements.		☐ 4 ☐ 0
c	The project provides transitional affordable housing for the homeless.		☐ 5 ☐ 0
d	The project provides transitional affordable housing for veterans.		☐ 5 ☐ 0
e	The project provides a mix of housing types (detached single family dwellings, multi-family units, accessory dwelling units, owner-occupied units, and renter-occupied units).		☐ 5 ☐ 0
f	The project includes rehabilitation of existing affordable housing units.		☐ 5 ☐ 0
g	In addition to providing the required on-site affordable housing units, the project includes payment of inclusionary housing fees or provides off-site affordable units within a city, Community Area, or Rural Center.		☐ 4 ☐ 0
		Total Points Received for Affordable Housing (Max = 30):	

	SCORING CRITERIA	EVIDENCE/DOCUMENTATION	SCORE
2	**Infrastructure**		
a	The project includes improvement of existing infrastructure, beyond the minimum required, in an area where current residents are experiencing significant infrastructure deficiencies and/or problems.		☐ 5 ☐ 0
b	The project includes onsite recreational opportunities beyond 10% of the minimum requirements set forth in the 1975 Quimby Act (Government Code Section 66477).		☐ 4 ☐ 0
c	The project includes providing onsite public amenities, including but not limited to: fire stations, libraries, community-use buildings, community gardens, hiking trails, and open space in an area where such amenities are not easily accessible to the community.		☐ 5 ☐ 0
d	The project includes waste diversion program that includes recycling and composting and the reduction of waste hauler trips.		☐ 3 ☐ 0
e	The project will not result in decreasing the existing level of service/service standards identified in Table PS-1 of the 2010 General Plan for road intersection level of service, water, sanitation, solid waste, and schools serving the project area.		☐ 3 ☐ 0
f	The project provides critical infrastructure and services such as fire stations, sheriff substations, emergency service stations, clinics, or hospitals within a deficient area.		☐ 5 ☐ 0
		Total Points Received for Infrastructure (Max = 25):	

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	SCORING CRITERIA	EVIDENCE/DOCUMENTATION	SCORE
3	**Resource Management**		
a	The project includes groundwater recharge facilities.		☐ 3 ☐ 0
b	The project includes restoration/rehabilitation of environmentally sensitive habitat areas (ESHA) and provides for the long-term maintenance of these areas.		☐ 3 ☐ 0
c	The project includes the voluntary conservation/preservation of unique visual or natural features, critical habitat, or prime agricultural soils through conveyance of a conservation easement from the property owner to either the County of Monterey, an appropriate public entity, or a non-profit public benefit corporation.		☐ 3 ☐ 0
d	The project includes an onsite renewable energy component that will supply energy to the proposed development.		☐ 3 ☐ 0
e	The project has no impact to nearby resources.		☐ 3 ☐ 0
		Total Points Received for Resource Management (Max = 15):	

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	SCORING CRITERIA	EVIDENCE/DOCUMENTATION	SCORE
4	**Site Suitability**		
a	The development is sited and designed to be subordinate to the natural setting of the subject property and surrounding area. The project avoids development on slopes in excess of 25%, tree removal, major vegetation removal, development in the floodplain, and ridgeline development.		☐ 5 ☐ 0
b	The development includes infill of vacant non-agricultural lands within existing developed areas and is compatible with surrounding land use and development.		☐ 3 ☐ 0
c	The subject property is not located within a landslide area or areas showing evidence of ground movement within historic times, within 50 feet of the face of a cliff or bluff, within 1/8th mile of an active or potentially active fault, or in any area of known geologic hazards.		☐ 2 ☐ 0
		Total Points Received for Site Suitability (Max = 10):	

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	SCORING CRITERIA	EVIDENCE/DOCUMENTATION	SCORE
5	**Balance of Uses**		
a	The project includes industrial, commercial, and/or agriculturally industrial development, consistent with the underlying zoning of the property, and provides employee housing units.		☐ 4 ☐ 0
b	The project includes mixed-use development.		☐ 3 ☐ 0
c	The project provides housing in an area with an established employment concentration but lacks available housing or the project includes industrial, commercial, and/or agriculturally industrial development, consistent with the underlying zoning of the property, within an area where there is an established workforce to support the proposed use.		☐ 3 ☐ 0
		Total Points Received for Balance of Uses (Max = 10):	

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	SCORING CRITERIA	EVIDENCE/DOCUMENTATION	SCORE
6	**Traffic and Proximity to Transportation**		
a	The project provides or improves transit service in an area where bus routes do not exist or access is limited. This includes, but is not limited to: construction of bus stops, re-routing of buses, or the increase of bus service and stops.		☐ 4 ☐ 0
b	The project is located within ½ mile of an existing bus stop with sufficient amount of service and stops to serve the development.		☐ 2 ☐ 0
c	The project includes construction of bicycle and pedestrian facilities that connect to existing facilities.		☐ 2 ☐ 0
d	The project includes a traffic reduction plan for project related traffic.		☐ 2 ☐ 0
		Total Points Received for Traffic and Proximity to Transportation (Max = 10):	

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	SCORING CRITERIA	EVIDENCE/DOCUMENTATION	SCORE
7	**Environmental Impacts**		
a	Agriculture and Forest Resources		☐ -10 ☐ 0
b	Air Quality		☐ -10 ☐ 0
c	GHG Emissions		☐ -10 ☐ 0
d	Biological Resources		☐ -10 ☐ 0
e	Hydrology & Water Quality		☐ -10 ☐ 0
f	Growth Inducement		☐ -10 ☐ 0
g	Land Use Planning		☐ -10 ☐ 0
h	Traffic Impacts		☐ -10 ☐ 0
i	Wildfires		☐ -10 ☐ 0

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	SCORING CRITERIA	EVIDENCE/DOCUMENTATION	SCORE
		Total Points Subtracted for Environmental Impacts (Max = -90):	

OVERALL SCORE		
	CATEGORY	**TOTAL POINTS**
1	Affordable Housing	
2	Infrastructure	
3	Resource Management	
4	Site Suitability	
5	Balance of Uses	
6	Traffic and Proximity to Transportation	
7	Environmental Impacts	
	Total DES Score:	

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