

# BUDGET & ANNUAL WORK PLAN

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FISCAL YEAR  
2020/2021

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Santa Clara Valley Open Space Authority  
Approved by the Board June 11, 2020



**On the Cover:**

Saving San Jose's Largest Remaining Wetland –

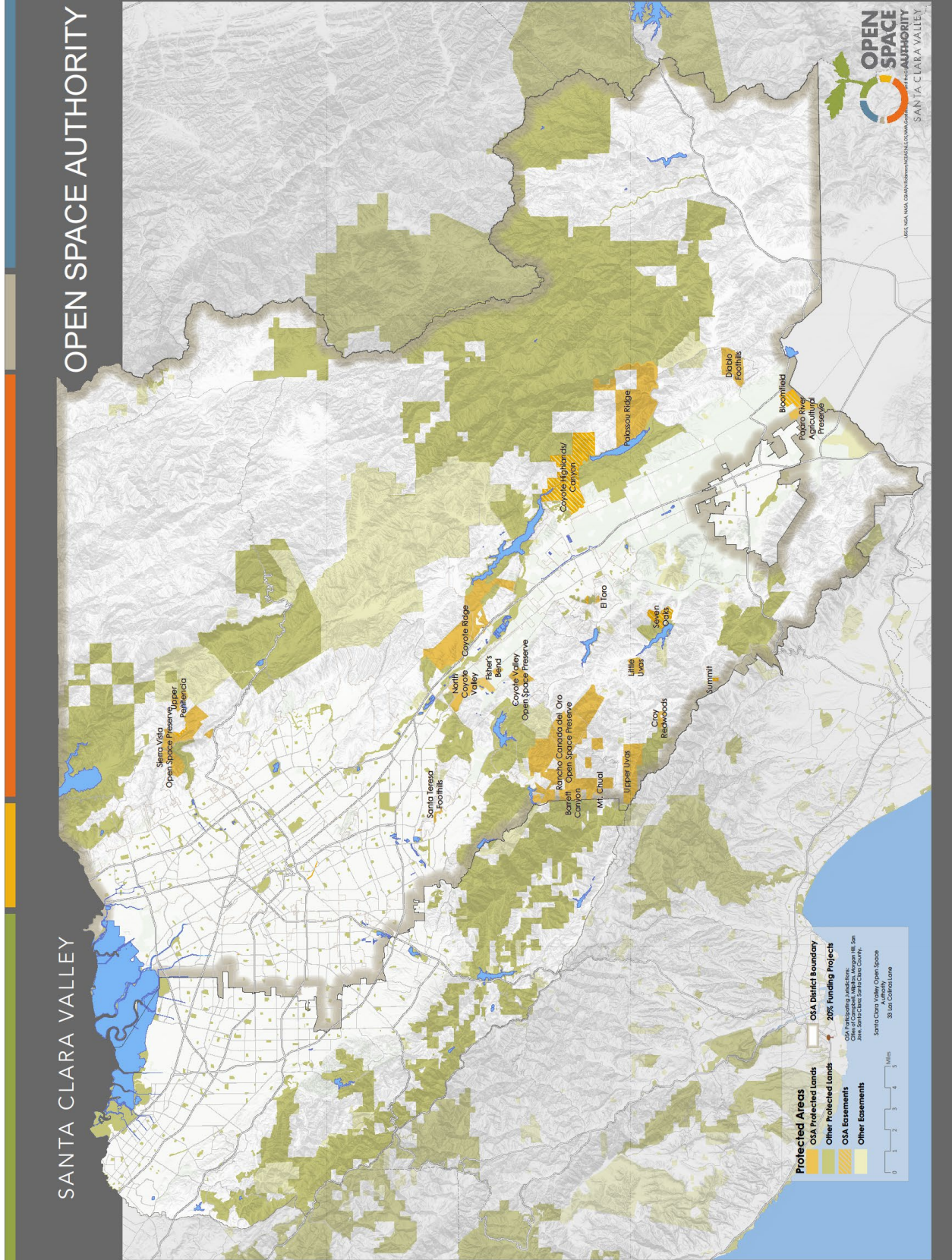
Thanks to the purchase of 937 acres in North Coyote Valley by the Open Space Authority, the City of San Jose, and Peninsula Open Space Trust in November of 2019, Laguna Seca will be permanently protected

**To the right:**

2020 Jurisdiction Map highlighting the Authority's protected lands and easements

# Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021



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Board of Directors



Alex Kennett  
District 1



Mike Flaugher  
District 2



Sequoia Hall  
District 3



Dorsey Moore  
District 4



Shay Franco-Clausen  
District 5



Mike Potter  
District 6



Dr. Calvin Gill  
District 7



San Jose's Last Chance Wildlife Corridor – North Coyote Valley

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Andrea Mackenzie  
General Manager

### General Manager's Message

The Open Space Authority's FY 2020/2021 budget has been prepared in the midst of an unprecedented health emergency and shelter in place order brought on by the COVID-19 global pandemic. Operating a virtual public agency while delivering continuous and essential open space services and protecting the health of the public and staff has required teamwork, adaptation, and innovation at all levels of the agency. The proposed Budget and Work Plan for FY 2020/2021 reflect a conservative approach to spending based on the current health crisis, economic downturn, and near-term uncertainty of state and local revenues. Over the last six years, the Authority has been very

effective at leveraging its modest benefit assessment and parcel tax revenues of \$12 million annually to attract millions of dollars of funds from public agencies, non-profit conservation partners, and foundations to complete high-priority land acquisition, restoration, public access planning and open space improvement projects to benefit the public. But grant funds from these sources are not certain in FY 2020/2021 and in fact may likely decline, increasing competition for fewer dollars over the next year or more.

As we look back at the prior fiscal year, pre-COVID-19, the Authority had a number of significant conservation successes that demonstrate the importance of funding partnerships and innovation in protecting and caring for Santa Clara Valley's natural assets; an approach that remains even more relevant in the midst of a crisis.

- The Authority partnered with the City of San Jose and Peninsula Open Space Trust (POST) to complete the historic conservation purchase of 937 acres in North Coyote Valley, preserving long-threatened valley floor open space with irreplaceable natural, agricultural and resilience benefits
- The Authority sponsored AB 948, authored by Assemblymember Kalra and signed into law by Governor Newsom, to create the *Coyote Valley Conservation Program Area*, designating Coyote Valley as a landscape of statewide significance
- The Authority sponsored public access days on five not-yet-opened properties which attracted 3,253 visitors
- The Authority increased public visitation at Open Space Preserves by 25% to more than 325,000 visitors annually
- The Authority's grants to urban communities surpassed \$11 million to date, connecting more than 8,000 people to nature in their neighborhoods
- The Authority established new coordination and communication channels between open space districts, park agencies and NGOs in the South Bay and across the San Francisco Bay Region to help deliver and sustain essential park and open space services during the COVID-19 crisis

**5 Year Strategic Plan**

Assess the agency’s strategic staffing and revenue needs for anticipated land conservation and capital improvement costs, ongoing land management, natural resources management needs, operations and maintenance capacity, and urban grants program.

**Coyote Valley Open Space and Agricultural Land Conservation**

Acquire and/or manage additional North and Mid Coyote Valley properties to expand Coyote Valley Open Space Preserve and implement the Coyote Valley Landscape Linkage and Santa Clara Valley Ag Plan

**North Coyote Valley Master Plan**

Launch the master planning process for North Coyote Valley Conservation Area in close coordination with the City of San Jose and Peninsula Open Space Trust (POST)

**Coyote Ridge Open Space Preserve**

Begin construction of Phase One public access improvements including Malech Road staging area and Bay Area Ridge Trail connections; accept transfer of the 1,526-acre East Coyote Ridge property from the Santa Clara Valley Habitat Agency

**Rancho Cañada del Oro (Blair Ranch)**

Complete design, environmental documentation, and permitting for public access improvements including Llagas Creek bridge, day-use area, and Blair trail connection

**Visitor Serving and Public Safety Improvements**

Investigate and implement a parking reservation system for open space preserves and connect Open Space Authority Open Space Technicians to the County communications system

**Natural Resources Management**

Complete grazing and habitat improvements on Coyote Ridge in coordination with the Valley Habitat Agency and state and federal wildlife agencies; undertake a fuels management plan to prepare for future wildfires affecting wildland areas in Authority’s jurisdiction; and restore a 3.5 acre section of Fisher Creek Riparian Corridor to enhance wildlife movement, restore habitat and improve water quality

**Santa Clara Valley Agricultural Plan Implementation**

Establish a regional agricultural conservation easement program in partnership with Santa Clara County under a grant agreement with the CA Dept of Conservation

Looking toward FY 2020/2021, there are many uncertainties about state and local budgets, including those of our long-standing partner agencies and organizations. Yet there will also be opportunities and in fact a necessity for mutual support, working with partners to sustain nature, people, and the economy of our region.

**Urban Grants Program Investments**

Launch 2020/2021 solicitation for applications for the Authority’s Urban Grants Program

**Public Awareness and Transparency**

Release report to the public on Measure Q investments and successes to date (2014-2020)

**Climate Resilience**

Complete Phase II Climate Smart San Jose study in coordination with City to integrate natural and working lands into the City’s climate action plan and evaluate climate tradeoffs for different land use scenarios; collaborate with Santa Clara County Office of Sustainability on County’s Climate Action Plan; partner with SPUR and San Francisco Estuary Institute (SFEI) to improve climate resilience through nature-based solutions in urban and rural areas, using San Jose as a case study to promote green infrastructure and policy solutions; explore feasibility for a public-private pilot project for climate-smart / regenerative agriculture in the Coyote Valley

## Santa Clara Valley Open Space Authority

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APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

As we look towards the future, climate resiliency will be an increasingly important lens through which to view the Authority's strategic priorities and expenditures. In the coming fiscal year, the Authority's Work Plan will focus on climate resilient projects and priorities, such as those highlighted to the left. Post COVID-19, as more information becomes known that could delay or defer these projects, staff will return to the Board at Mid-Year with any recommended changes.



*Aerial View of Coyote Valley*

Despite the serious crisis that faces us all at this time, the Authority as a special purpose government agency must continue its mission to serve the public by protecting and restoring open space and natural resource areas, supporting agriculture, and connecting people to nature. As former Secretary of the Interior Sally Jewell has said, “we are in the business of forever.” We must embrace a hopeful and long-term perspective in planning for the needs of people and nature. In the face of dual global health and climate crises, this means strategically planning for resilience, embracing change, and adapting to whatever the “new normal” may be. What *has* emerged through the COVID-19 crisis is that nature is *essential* to the health and well-being of our communities and now, more than ever, people need nature nearby.

Sincerely,

A handwritten signature in blue ink that reads "Andrea Mackenzie". The signature is fluid and cursive, with a prominent initial 'A' and a long, sweeping tail.

Andrea Mackenzie  
General Manager

THE OPEN SPACE AUTHORITY CONSERVES THE NATURAL ENVIRONMENT, SUPPORTS AGRICULTURE, AND CONNECTS PEOPLE TO NATURE, BY PROTECTING OPEN SPACES, NATURAL AREAS, AND WORKING FARMS AND RANCHES FOR FUTURE GENERATIONS.



**OUR VISION, OUR VALLEY, OUR FUTURE**

We envision the Santa Clara Valley and its surrounding hillsides as a beautiful place where a vibrant network of interconnected open spaces, trails, wildlife habitats and thriving agricultural lands enrich the region’s cities, making our Valley an exceptional and healthy place to live, work, learn and play.

In our vision of the Santa Clara Valley:

- A well-managed network of open spaces, farms and ranches sustains our natural heritage and provides resilience to a changing environment
- All members of our community are aware of the values of nature and have convenient access to local recreational and environmental education opportunities
- Our drinking water is safeguarded by protecting our local creeks and watersheds, from their headwaters in the surrounding hills to the Bay
- Community investment in nature--and the essential benefits that nature provides--sustains and enhances a healthy environment and economy
- The rich heritage of the Valley’s agriculture is thriving, with locally grown foods contributing to healthy communities and creating a sense of place and pride in our region
- The Open Space Authority contributes to the region’s quality of life by building and sustaining public and private partnerships in all our communities

**OUR CONSERVATION GOALS**

- ▶ Protect and manage an interconnected system of wildlands and natural areas to support native habitats and species and to ensure resilience to a changing environment.
- ▶ Protect and restore water resources to benefit local communities and the environment.
- ▶ Conserve farms, ranches, and working landscapes to sustain the economic and environmental viability of agriculture in the County.
- ▶ Protect and manage an interconnected network of open space lands that provide opportunities for nature-based recreation and education for all residents.



### THE HISTORY OF THE OPEN SPACE AUTHORITY

The Open Space Authority (the Authority) was founded in 1993 for the purposes of balancing rapid development and ensuring protection of valuable open space lands and productive farm and ranchland. In 1994, voters within the Authority's jurisdiction approved a \$12 per-parcel annual benefit assessment, providing an estimated \$4.2 million per year to fund and oversee preserve maintenance, capital projects, and land acquisitions.

The Authority's jurisdiction includes the cities of San Jose, Santa Clara, Milpitas, Campbell, Morgan Hill, and parts of unincorporated Santa Clara County. The Authority's purpose is to protect the County's quality of life by preserving open space and natural resources; it does so through well-planned land preservation, state-of-the-art resource management, educational programs, and collaborative partnerships.

As a California Special District, the Authority operates under Section 35100 of the California Public Resources Code and is governed by a seven-member board of directors elected by voters to serve four-year terms representing a specific area referred to as a district. The Board oversees all Authority business including approval of policies, Annual Work Plans, and budgets and appoints the General Manager to oversee the day-to-day operations of the Authority.

In addition, a 13-member Citizens' Advisory Committee (CAC) provides public input to the Board, maintains a channel of communication to the Board, aids in fostering a positive public image of the Authority, and helps educate the public about the Authority's goals and accomplishments. Members of the CAC are appointed by the Board to serve two-year terms. Seven of the members represent each of the Authority's districts; six more are At-Large members that bring unique skill sets and experiences including but not limited to: agriculture, business, civic organizations, development community, parks, public health and safety, and/or trails.

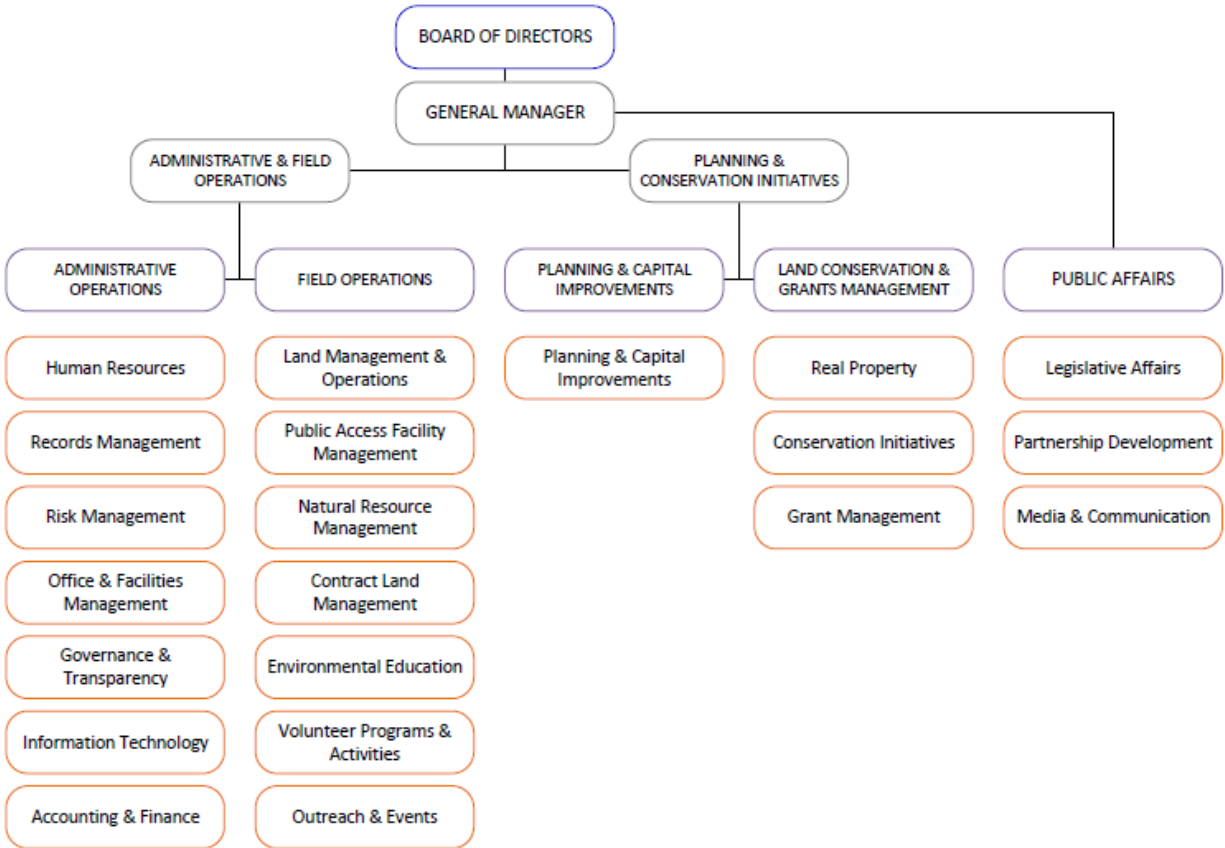
In 2014, the Measure Q Parcel Tax, a 15-year, \$24 per-year parcel tax, passed with overwhelming support from voters. The measure brings in approximately \$8 million per year to fund protection of wildlife, water, working lands and other open space, increase public access, and create new urban open spaces and environmental education programs.

A seven-member Expenditure Oversight Committee (EOC) was formed after the passage of Measure Q. The purpose of the EOC is to review Measure Q expenditures on an annual basis to ensure they conform to the Measure Q Expenditure Plan.

The Board of Directors holds regular public meetings the second and fourth Thursday of each month except in November and December, when meetings are held only on the second Thursday. The meetings are held at the Authority's Headquarters Office located at 33 Las Colinas Lane, San Jose, California. Information about the Authority's upcoming meetings may be found on the website [www.openspaceauthority.org](http://www.openspaceauthority.org) or by calling the Authority offices at (408) 224-7476.

**STAFFING AND STRUCTURE**

The Open Space Authority has 45 Board-approved positions, including the Board-appointed General Manager, who implement the agency’s mission through the following programs:

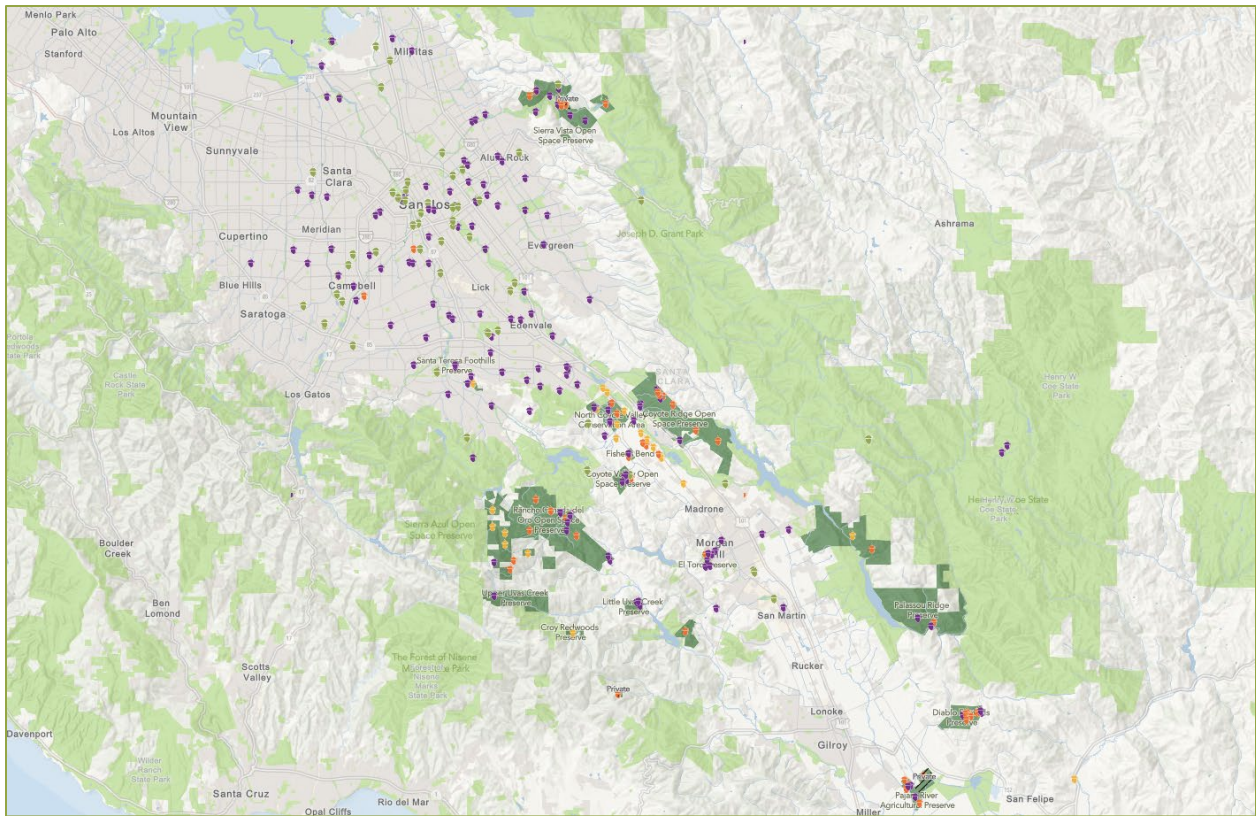


## Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

### IMPACT OF MEASURE Q

In its first five years, Measure Q funded a doubling of the number of acres protected as open space in the Authority's jurisdiction to almost 30,000 acres – including a once-in-a-generation acquisition of almost 1,000 acres of long threatened open space in the North Coyote Valley. With the support of Measure Q, the Authority has efficiently and effectively invested in high priority, high impact conservation, restoration, and recreation projects to improve our quality of life. And these expenditures have resulted in an impressive return on investment – for every \$1 of Measure Q funds spent, the Authority has been able to attract \$3 in public and private partnership funds for conservation, restoration, and recreation projects.



*Investments in Nature – a map of projects funded by Measure Q (as symbolized by acorns)*

As former Secretary of the Interior Sally Jewell has said, we are in the business of *forever*. Thanks to your support of Measure Q, the Authority's investments in nature today are essential down payments on a livable future for many generations to come. To read more about the impact Measure Q has made in your neighborhood, please check out the [Investing in Nature: Five-Year Impact Report to the Community](#).



# PART I THE BUDGET



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## **Budget Development Process**

The budget and work plan development process began in early December 2019. The General Manager and the department managers revisited the Authority’s mission, vision, and goals as laid out in the Measure Q Expenditure Plan, the Santa Clara Valley Greenprint, and District 1 Assessment’s 5 Year Plan. The process of building the Budget and Annual Work Plan included a publicly-noticed Board Workshop on March 11, 2020 in which the Board identified their high-priority initiatives and projects for the coming fiscal year, providing Staff with clear direction on building a balanced and sustainable budget. The resulting Budget and Annual Work Plan becomes the guiding document for staff to record and track expenditures for approved projects and goals.

## **Guidelines and Assumptions**

The Open Space Authority has developed the following guidelines and assumptions that address Authority revenues and income. The Authority ensures revenue and income is spent in the most efficient and effective manner possible, consistent with serving the public interest and in accordance with existing law. To that end, the Authority has compiled the following list of budgetary assumptions to guide the budgeting and expenditure process.

### General Guidelines

The Authority will fund up to 33% of costs related to land acquisition projects over \$500,000. The remainder of the project costs will come from other sources. Consideration to increase funding beyond the 33% will be made on a project by project basis.

Authority seeks to secure at least 25% in non-Authority funds for each major Capital Improvement Project (CIP) project.

Allocate a minimum of \$250,000 on an annual basis from the District 1 Assessment to capital projects, capital purchases and/or acquisitions.

The Authority will recapture staffing and other costs as a condition of land management and partner agreements whenever feasible.

### Measure Q Expenditure Guidelines

The Authority will expend no more than 5% (approximately \$395,000 per year) of the revenue generated by Measure Q toward administrative expenses.

To the extent permitted by law, 0.1 % of the gross proceeds of the parcel tax shall be made available for the Expenditure Oversight Committee’s activities.

Up to 25% of the annual Measure Q revenue will be set aside for the Urban Open Space Grant Program.

## Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

Measure Q revenues are used for:

- ▶ Funding the preservation of land including acquisition (fee purchase) and conservation easements.
- ▶ Paying for project costs including research, project-scoping, planning, construction, and maintenance.
- ▶ Paying for staff time charged to Measure Q projects.
- ▶ Natural Resource Protection to protect and restore natural areas.
- ▶ Land Operations and Maintenance to maintain all of Authority's existing and new preserves, trails, and preserve-related infrastructure.
- ▶ The creation, development, delivery and maintenance of existing and new environmental and agricultural education programs and initiatives.
- ▶ Funding the Measure Q Urban Open Space grant program.



*Coyote Valley Open Space Preserve*

## Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

### Fund Balance Carryover

By July 1, 2020, it is estimated that the Authority will carry over a cumulative total of \$46,292,677 from previous fiscal years.

However, fiscal policies that may be in effect and encumbrances placed on the funds restrict the total availability of the carryover at the beginning of the Authority's fiscal year.

Of the \$46,292,677 in carryover funds, \$28,887,400 is available for withdrawal in the FY 2020/2021 budget (Table 1).

With approval by the Board through a formal budget hearing, the available balance may be used to pay for unanticipated projects or opportunities that emerge over the course of the fiscal year, i.e. a strategic land purchase or response to a natural disaster.

Projected Carryover by Fund	Projected Ending Fund Balance	Estimated Available Funds
District 1	11,514,511	
(minus) 20% Funding Program	(2,201,981)	
Available Carryover Funds from District 1		9,312,530
Measure Q	11,550,089	
Available Carryover Funds from Measure Q		11,550,089
MQ Urban Open Space Grants	3,081,371	
(minus) Awarded UOS Grants	(1,103,296)	
Available Carryover Funds from UOS Grants		1,978,075
Reserve	19,631,460	
(minus) Operational Reserve	(14,000,000)	
(minus) Conservation Stewardship	(100,000)	
Available Carryover Funds from Reserve		5,531,460
Grants	515,246	
Available Carryover Funds from Grants		515,246
<b>TOTAL AVAILABLE CARRYOVER FUNDS FOR FY 2020/2021</b>		<b>28,887,400</b>

Table 1

## Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

### Fiscal Year 2020/2021 Budget Summary

The budget seeks to achieve the following: 1) balance expenditures to District 1 Benefit Assessment and Measure Q Parcel Tax revenues; 2) prioritize and implement projects that support the goals and objective of Measure Q and the Santa Clara Valley Greenprint; and 3) leverage grants and outside funding for acquisitions and capital improvement projects.

Occasionally, strategic opportunities, such as a land purchase, may develop right before or during the fiscal year; such scenarios may make it more difficult for the Authority to balance total expenditures to District 1 Benefit Assessment and Measure Q Parcel Tax revenues. However, when such strategic projects or opportunities occur, the Authority may propose using available carryover to help supplement the estimated revenues the agency expects to receive in the upcoming fiscal year.

Total revenues received from District 1 and Measure Q, as well as land management income recouped from other local agencies for contracted land management services and agricultural lease income, are expected to be \$12,808,266. The Authority is expected to spend \$12,717,805 of the revenues received (Table 2).

Total expenditures for FY 2020/2021 are estimated to be \$22,455,805, of which \$12,717,805 is funded by incoming District 1 Assessment and Measure Q Parcel Tax revenues and the remaining \$9,738,000 is funded by grants, carryover and other income (Table 3).

The complete budget can be found in [Appendix C](#).

Revenues and Expenditures	Estimated
FY 2020/2021 Estimated Authority REVENUES	12,808,266
FY 2020/2021 Estimated Authority EXPENDITURES	12,717,805

Table 2

Expenditure Breakdown by Funding Source	Estimated
District 1	4,502,419
Measure Q	8,215,386
<i>Authority-funded Expenditures</i>	<i>12,717,805</i>

Grants and Other Income	2,306,000
Measure Q Urban Open Space Grants Allocation	1,000,000
District 1 Fund Carryover	1,500,000
Measure Q Fund Carryover	4,615,000
Capital Reserve Fund Carryover	317,000
<i>Non-Revenue Expenditures</i>	<i>9,738,000</i>

<b>TOTAL EXPENDITURES</b>	<b>22,455,805</b>
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Table 3

## Revenue and Income

### Revenue

The Open Space Authority has two revenue Funds: the District 1 Assessment and the Measure Q Parcel Tax. Additionally, through agreements with the other organizations and agencies, the Authority provides contract land management services on lands adjoining Authority property.

The Authority aims to balance expenditures to these estimated revenue streams.

**District 1 Assessment (revenue)** – District 1 Assessment (District 1) is a \$12 per-parcel annual benefit assessment approved in 1996 by voters within the Authority’s jurisdiction. District 1 brings in approximately \$4.2 million per year and must be renewed annually through resolution of the Board of Directors.

Use of the District 1 revenue is guided by the policies and goals stated in the 5 Year Plan, first adopted by the Board in June of 1996. District 1 revenue is used to fund open space and greenbelt acquisition, to fund and oversee maintenance projects throughout the boundaries of the Authority, to develop and maintain lands, trails, natural areas and other facilities for outdoor recreation, as allowed under the Santa Clara County Open Space Act, and to reimburse the Authority for incidental costs associated with the District. [Taken from Open Space Acquisition and Maintenance District No. 1 (District 1 Engineer’s Report)]

The 5 Year Plan guidelines require a portion of capital expenditures be set aside to fund an urban open space grant program, referred to as the 20% Funding Program. The objective of the 20% Funding Program is for participating jurisdictions to acquire and develop open space lands within their own jurisdictions. Funds are allocated to the 20% Funding Program at the end of each fiscal year based on actual capital fund expenditures from District 1.

**Land Management Income** – Staff time and expenses incurred for contracted land management are invoiced to other organizations and agencies for reimbursement.

**Measure Q Parcel Tax (revenue)** – The Measure Q Parcel Tax (Measure Q) is a 15-year, \$24 per-year parcel tax approved by voters in November of 2014. Measure Q brings in approximately \$8 million per year.

Fulfillment of the requirements of the Measure Q Parcel Tax is guided by the Measure Q Expenditure Plan (Expenditure Plan). Measure Q provides funding to deliver on the following objectives, which come from the Santa Clara Valley Greenprint and the Expenditure Plan:

- Protect Open Space, Redwood Forests, Wildlife Habitat, Scenic Hillside and Agricultural Land
- Protect Land around Creeks, Rivers and Streams to Prevent Pollution and Improve Local Water Quality and Supply
- Open, Improve and Maintain Parks, Open Space and Trails
- Urban Open Space Parks and Environmental Education

**Agricultural Leases** – Anticipated revenues from agricultural lease(s) will be used to offset costs associated with the maintenance and operations of Pajaro River Agricultural Preserve.

**Non-Revenue Income Sources**

The Authority’s other sources of funding come from the Capital and Operational Reserve Fund, grants received from other agencies and organizations, and other income such as donations and lease income.

**Reserve Fund (Capital, Operational and Conservation Stewardship)** – The Reserve Fund is an unrestricted fund (unlike District 1 Assessment and Measure Q Parcel Tax). In 2013 the Authority Board, through its Financial Reserve Policy, Resolution 13-25, created two funds under the Reserve Account: the first, the Operating Reserve Fund is a contingency account of \$14 million for two years of operating expenses; the other, referred to as the Capital Reserve Fund, is available for land acquisition, capital projects and one-time expenditures. In 2017, the Authority Board updated the Financial Reserve Policy to create an additional fund, setting aside \$100,000 for Conservation Stewardship purposes.

**Grants and Other** – The Open Space Authority strives to leverage its own funds with grants from government agencies, foundations, and private/non-profit organizations and partnerships. Grant income is budgeted when the Authority expects to meet the grantor’s eligibility requirements, either by expending staff time or completing the milestones and/or deliverables set in the grant agreement(s), by the end of the fiscal year.

Additionally, the Authority accepts unsolicited donations including gifts of land. The Authority also receives income from grazing leases and permit fees for special uses of Authority property.

**Urban Open Space Program Funds** – At the end of a fiscal year, the Authority can allocate up to 25 percent of the Measure Q Parcel Tax revenue received, earmarking that amount for grant awards in future competitive grant cycles.

While technically not considered either income or revenue, the Urban Open Space Grant Program fund balance appears in this section to show the estimated amount available for award during the grant cycle to be held during fiscal year 2020/2021.



*Valley Verde: Home Garden Project*



## Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

### FY 2020/2021 Projected Revenues and Income

Non-revenue income sources include interest income, unsolicited donations, land sales, lease income, and special use permit income. Due to the unpredictable nature of unsolicited donations and low occurrences of land sales, the Authority does not rely on these income sources, and is not normally budgeted.

On the other hand, because interest income and lease income are recurring and may be predicted, the estimated amounts are included in the annual budget. However, while included as projected income, the Authority does not depend on and include these estimated amounts to pay for budgeted expenditures in the upcoming fiscal year. This conservative approach ensures that the Authority does not incur deficit spending when scenarios, such as market rates negatively affecting interest income, the Authority does not retain the estimated fund balance for an entire fiscal year, or leases terminating earlier than anticipated, occur.

Funds are withdrawn from available carryover from the previous fiscal year, deposited as other income, and budgeted to be spent in the coming fiscal year. For FY 2020/2021, the Authority proposes to withdraw a total of \$7,432,000 (\$1,500,000 from District 1 fund, \$317,000 from Capital Reserve fund, \$4,615,000 from Measure Q fund, and \$1,000,000 from the Measure Q Urban Open Space Grant Program) from the available carryover balances.

Revenue/Income	FY20/21 District 1	FY20/21 Reserve	FY20/21 Measure Q	FY20/21 MQ UOS	FY20/21 Grants	FY20/21 TOTAL
<b>5000 - REVENUES</b>						
5100 - Revenue	4,373,501		8,083,315			12,456,816
5700 - Land Management						
5701 - VTA						
5702 - SCVWD						
5703 - Waste Mgmt						
5704 - Valley Habitat Agency	154,000					154,000
5601 - Lease	16,450		115,000			131,450
5901 - Cost Share Reimbursements			66,000			66,000
<b>TOTAL REVENUE</b>	<b>4,543,951</b>		<b>8,264,315</b>			<b>12,808,266</b>
<b>OTHER INCOME SOURCES</b>						
Capital Reserve Fund Carryover		317,000				317,000
District 1 Fund Carryover	1,500,000					1,500,000
Measure Q Fund Carryover			4,615,000			4,615,000
Measure Q UOS Fund Carryover				1,000,000		1,000,000
5200 - Interest Income	100,000	200,000	200,000			500,000
5300 - Grants					2,306,000	2,306,000
5400 - Donations						
5500 - Land Sales						
5600 - Land Use Income						
5602 - Grazing Lease Income	18,000					18,000
5603 - Use Permit Income						
<b>TOTAL OTHER INCOME SOURCES</b>	<b>1,618,000</b>	<b>517,000</b>	<b>4,815,000</b>	<b>1,000,000</b>	<b>2,306,000</b>	<b>10,256,000</b>
<b>ALL REVENUE AND INCOME</b>	<b>6,161,951</b>	<b>517,000</b>	<b>13,079,315</b>	<b>1,000,000</b>	<b>2,306,000</b>	<b>23,064,266</b>

Table 4

## **FY 2020/2021 Budget**

The FY 2020/2021 Budget reflects the goals of the FY 2020/2021 Annual Work Plan. Total expenditures for FY 2020/2021 are estimated to be \$22,455,805, a 14% increase from FY 2019/2020.

The Authority has several major expense categories:

**Payroll and Benefits** include expenditures related to salaries and stipends, payroll taxes, and health benefits of full-time staff, part-time staff, temporary staff, and board members.

**Travel and Expenses** include mileage reimbursements to staff, as well as travel-related expenditures such as airfare, tolls, parking fees, and public transportation to offsite partner meetings and professional conferences.

**Supplies and Consumables** include goods and supplies purchased and intended for one-time and/or limited consumption. Examples include office and kitchen supplies, postage, and printing expenses. Field operations-related supplies include safety supplies, fuel, supplies for disposing hazardous materials, vegetation management supplies, signs and fencing materials, and fire management supplies.

**Outside Services** include expenditures related to professional services and consultancies rendered under contract. Services may include IT support services, legal services, human resources development services, recruiting services, design and content services, community relations and media services, resource management services, planning services, and acquisition and construction related services.

**Other Services and Expenses** capture miscellaneous fees and other expenses. Examples include business insurance, payroll processing fees, permitting fees, escrow fees, and brokerage fees. The Santa Clara County's Assessor's Office collector's fee (1%) is recorded under this category.

**Equipment and Maintenance** expenses include procurement and maintenance of tools, field and shop equipment, and vehicles for use in field operations and maintenance of the Authority's preserves. This category also includes expenses for computer workstations and servers, as well as recurring software subscriptions and licenses.

**Facilities and Utilities** cover all expenditures related to the operations and maintenance of the Authority's properties, including water and electricity utility bills.

**Memberships and Sponsorships** include memberships and subscriptions paid to professional organizations and associations offering workforce development and training, educational materials, and certifications. Expenses also include professional sponsorships to support conservation partners and organizations in line with the Authority's mission and goals.

**Fee Title and Conservation Easements** capture the cost of acquiring fee title and easements.

**Authority Grant Programs** allocations and anticipated awards are stated in this expense category line. The budget shown under the Measure Q fund column recommends an allocation to be set aside for future grant cycles. In the MQ UOS fund column, the budget estimates the total dollar amount available for grant awards in this fiscal year.

## Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

### Budget At A Glance

Expenditures	FY20/21 District 1	FY20/21 Reserve	FY20/21 Measure Q	FY20/21 MQ UOS	FY20/21 Grants	FY20/21 Budget TOTAL	% of Budget TOTAL
<b>6000 - PAYROLL</b>							
Total Payroll	1,853,070		2,705,418			4,558,488	20%
<b>6100 - BENEFITS &amp; EMPLOYEE EXPENSES</b>							
Total Benefits	709,860		1,095,370			1,805,230	8%
<b>6200 - TRAVEL AND EXPENSES</b>							
Total Travel and Expenses	54,990					54,990	0%
<b>6300 - SUPPLIES AND CONSUMABLES</b>							
Total Supplies and Consumables	108,715		263,500			372,215	2%
<b>6400 - OUTSIDE SERVICES/CONSULTANTS</b>							
Total Outside Services/Consultants	717,906	140,000	3,134,700		1,146,000	5,138,606	23%
<b>6500 - OTHER SERVICES AND EXPENSES</b>							
Total Other Services and Expenses	1,085,766		460,398		160,000	1,706,164	8%
<b>6600 - EQUIPMENT AND MAINTENANCE</b>							
Total Equipment and Maintenance	363,954	160,000	299,500			823,454	4%
<b>6700 - FACILITIES AND UTILITIES</b>							
Total Facilities and Utilities	347,874	17,000	56,500			421,374	2%
<b>6800 - MEMBERSHIPS AND LIBRARY</b>							
Total Memberships and Library	75,284		0			75,284	0%
<b>6900 - FEE TITLE &amp; CONSERVATION</b>							
Total Fee Title and Conservation	685,000		4,315,000		1,000,000	6,000,000	27%
<b>6950 – AUTHORITY GRANT PROGRAMS</b>							
Total Authority Grant Programs			500,000	1,000,000		1,500,000	7%
<b>TOTAL EXPENSES</b>	<b>6,002,419</b>	<b>317,000</b>	<b>12,830,386</b>	<b>1,000,000</b>	<b>2,306,000</b>	<b>22,455,805</b>	<b>100%</b>

Table 5

**Santa Clara Valley Open Space Authority**

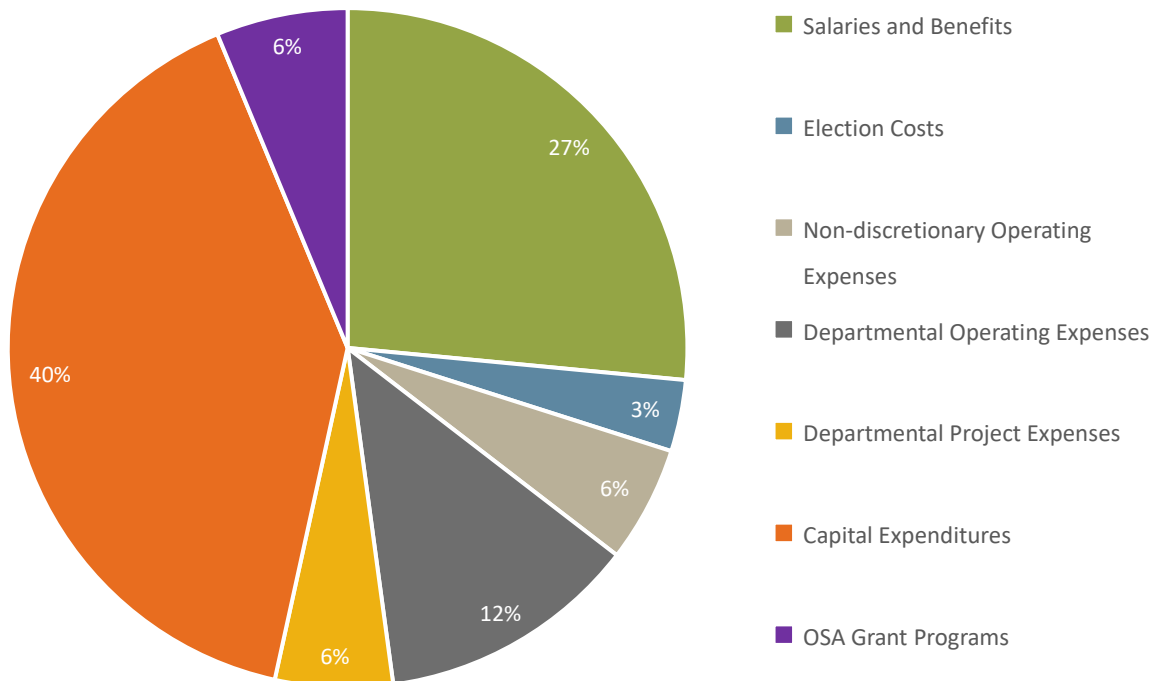
APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

**Expenditures by Department and Fund**

Expenditures	FY20/21 District 1	FY20/21 Reserve	FY20/21 Measure Q	FY20/21 MQ UOS	FY20/21 Grants	FY20/21 Department TOTAL
Land Conservation & Grant Management	930,061	-	6,304,550	1,000,000	1,000,000	<b>8,884,611</b>
Planning & Capital Improvements	145,499	-	2,264,321	-	700,000	<b>3,459,820</b>
Public Affairs	805,237	25,000	406,744	-	-	<b>1,236,981</b>
Field Operations	931,485	-	3,014,355	-	606,000	<b>4,551,840</b>
Administrative Operations	3,157,957	292,000	840,416	-	-	<b>5,290,373</b>
Board	32,180	-	-	-	-	<b>32,180</b>
<b>TOTAL EXPENDITURES BY FUND</b>	<b>6,002,419</b>	<b>317,000</b>	<b>12,830,386</b>	<b>1,000,000</b>	<b>2,306,000</b>	<b>22,455,805</b>

Table 6

**Expenditures by Type**



**Discussion of Expenditures**

**Staffing**

The Authority currently has 45 approved regular positions (Table 7). The recruitment of vacant positions is prioritized through a balance of staffing expense and how the role will support the efficient implementation of the Authority’s Work Plan.

Approved Regular Positions	
Land Conservation & Grant Management	Conservation GIS Coordinator, Planning Technician, Grants Administrator, Grants Coordinator, Senior Open Space Planner*, and Real Property Specialist
Planning & Capital Improvements	Planning Manager, Senior Open Space Planner, Assistant Open Space Planner
Public Affairs	External Affairs Manager, Communications Specialist, Community Engagement Coordinator (2)*, and Legislative Specialist
Field Operations	Field Operations Manager, Supervising Open Space Technician (2)*, Equipment Mechanic Operator, Lead Open Space Technician (2), Open Space Technician I (5), Open Space Aide (3), Resource Management Specialist, Volunteer Programs Administrator, Educational Programs Coordinator, Educational Aide (2)*
Administrative Operations	General Manager, Assistant General Manager (2), Clerk of the Board, Accounting and Finance Analyst, Office and Human Resources Administrator, Deputy Clerk of the Board, Executive Assistant, IT Technician, Staff Accountant, Administrative Assistant and Office Assistant

*Table 7 –Asterisk (\*) denotes one budgeted but currently vacant position*

To continue advancing the Authority’s mission and goals, and to best execute the FY 2020/2021 Work Plan, increased staffing is recommended within the Field Operations Department.

Field Operations will be augmented by the addition of two (2) full-time Open Space Technician IIs. These journey level positions will allow the Authority to ensure the continued delivery of excellent service to the public and maintenance of all Authority lands. With the additional acreage under management at the Authority and the increased visitation to Authority preserves each year, it is essential for appropriate staffing on the ground at the preserves each day. By adding these journey level positions, the Authority

## **Santa Clara Valley Open Space Authority**

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### APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

would not only have additional boots on the ground to respond to the volume of visitors but would also be able to support a greater, expansive visitor experience and environmental education events.

Approving these recommendations would increase the total number of regular positions at the Authority from 45 to 47.

**The budget reflects the addition of two (2) full-time positions for FY 2020/2021.**

#### **Benefits**

A competitive benefits package is provided to employees of the Open Space Authority. The package includes participation in the California Public Employees Retirement System (CalPERS), medical, dental, vision, Employee Assistance Program, \$25,000 life insurance and \$600 per year tuition reimbursement. In 2020/2021 the benefits package is approximately 40% of salary. Together, salaries and benefits are 27% of total expenditures for the year.

#### **Cost of Living Adjustment**

A comprehensive classification structure was put into place in April of 2014 to address equity within the agency as well as to benchmark the Authority against other comparable governmental agencies. The Open Space Authority uses a salary range pay plan that associates ranges to positions. Cost of living adjustments are applied to the Salary Range Chart and translated to the Position Pay Plan. Cost of living adjustments are recommended based on the March report of the Consumer Price Index for San Francisco-Oakland-San Jose for the year ending in February.

**A cost of living adjustment of 2.9% is recommended for FY 2020/2021.**

#### **Board and Committee Expenses**

Board stipends, meeting expenses, and Board and committee member trainings are expected to be \$32,180 for FY 2020/2021.

#### **Election Expenses**

Elections for District Board members occur in November of every even year. Board members serve four-year terms and elections are staggered amongst the seven board members. Seats for Districts 1, 3 and 4 occur in one election cycle. Districts 2, 5, 6 and 7 occur in the following election cycle. The County of Santa Clara Registrar of Voters oversees the election. For FY 2020/2021, the Authority has budgeted \$815,000 for the upcoming election year, which averages approximately \$272,000 per contested District.

## Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

### Non-Discretionary Operational Expenses

Non-discretionary operational expenses include expenditures incurred due to governance requirements, regulatory reporting, workplace compliance, and in general support of running day-to-day Authority operations.

#### Supplies and Equipment

Allowances are typically budgeted for general office supplies, copy room printing and supplies, postage, general field consumables such as fuel and health and safety supplies, and computer software and equipment to provide staff with the tools to deliver on the Authority's projects and program initiatives.

#### Occupancy and Utilities

Staff has budgeted for facilities and maintenance expenses including alarm monitoring services, internet and phone, electricity, garbage, and water, pest control, landscaping, and janitorial services. As required by building codes and safety regulations, Staff has also budgeted for routine HVAC maintenance, emergency lights testing, fire sprinklers and extinguishers testing, and elevator maintenance.

#### Contractual Services

The Authority relies on the expertise of professionals for services in areas in which it is most cost effective to not employ a regular staff member. Contractual services include audit services for District 1 and Measure Q, office equipment leases, assessment engineering services, IT and website support services, and legal services. The Authority has also budgeted for general support services for its enterprise systems like Acumatica, the Authority's financial accounting system, and Hubspot, a customer relationship management system.

#### Insurance and Fees

Staff has budgeted for worker's compensation and business insurance such as general liability, property, and auto. Other fees typically incurred during the course of business includes bank fees, payroll fees, special assessment taxes on property owned, and legal notices.

#### Computer Equipment and Software

The Authority commits a recurring annual cost for the licensing of its major enterprise systems and business software. The systems are used by staff on a daily basis and help maintain efficient workflows and support transparent reporting.

Software	Use	Est. Annual Cost
Acumatica	Financial accounting system	\$45,000
Office 365	Business software	\$18,000
Hubspot	CRM	\$15,000
ZoomGrants	Grant management system	\$10,000
PrimeGov	Legislative management system	\$8,400
ArchiveSocial	Records Management	\$6,000
Adobe	Business software	\$5,000
ArcGIS	Geographical information system	\$5,000
Backblaze	PC backup software	\$3,500
NinjaRMM	IT Remote Monitoring and Management	\$3,000
Amazon Web Services	Server backup software	\$2,500

**Santa Clara Valley Open Space Authority**

APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

**Expenditure Details by Department**

<b>Summary of Department Expenses for FY 2020/2021</b>						
<b>Expenditure Type</b>	<b>Land Cons &amp; Grant Mgmt</b>	<b>Planning &amp; Capital Improvements</b>	<b>Public Affairs</b>	<b>Field Ops</b>	<b>Admin Ops</b>	<b>TOTAL</b>
<b>Non-discretionary Operating Expenses</b>						
Staff Costs -- Salaries and Benefits	951,470	643,726	705,530	2,384,489	1,665,604	6,350,818
Non-discretionary Expenses	15,000	-	21,000	108,011	1,148,421	1,292,432
Election Costs	-	-	-	-	815,000	815,000
<b>Other Operating Expenses</b>						-
Departmental Operating Expenses	173,140	16,095	340,451	744,340	198,849	1,472,876
Departmental Project Expenses	595,000	100,000	170,000	204,000	270,500	1,339,500
Board	-	-	-	-	32,180	32,180
<b>Total Operating Expenses</b>	<b>1,734,140</b>	<b>759,821</b>	<b>1,236,981</b>	<b>3,440,840</b>	<b>4,130,554</b>	<b>11,302,805</b>
<b>Capital Expenditures</b>						
Land Acquisition	6,000,000	-	-	35,000	-	6,035,000
Capital/Structural Improvement	-	2,350,000	-	880,000	17,000	3,247,000
Capital Purchases	-	-	-	196,000	175,000	371,000
<b>Total Capital Expenditures</b>	<b>6,000,000</b>	<b>2,350,000</b>	<b>-</b>	<b>1,111,000</b>	<b>192,000</b>	<b>9,653,000</b>
<b>Authority Urban Open Space Grant Programs</b>						
District 1 20% Funding Program	-	-	-	-	-	-
MQ Urban Open Space Grant Allocation	500,000	-	-	-	-	500,000
MQ Urban Open Space Grant Awards	1,000,000	-	-	-	-	1,000,000
<b>Total Authority Urban Open Space Grants</b>	<b>1,500,000</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>1,500,000</b>
<b>TOTAL ESTIMATED EXPENDITURES FOR 2020/2021</b>	<b>9,234,610</b>	<b>3,109,821</b>	<b>1,236,981</b>	<b>4,551,840</b>	<b>4,322,554</b>	<b>22,455,805</b>

Table 8



## Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

### Three Year Historical Budget Comparison

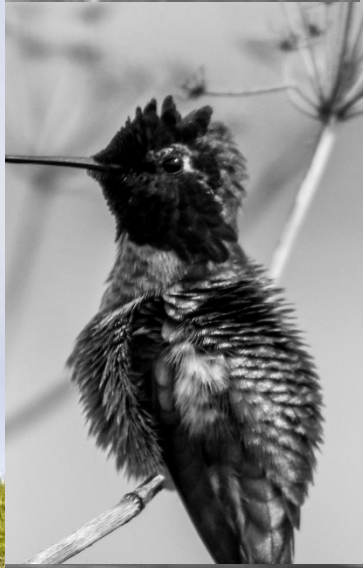
<b>Budgeted Revenues and Income</b>	<b>Budgeted FY 2018/2019</b>	<b>Budgeted FY 2019/2020</b>	<b>Proposed FY 2020/2021</b>
Revenues (District 1 and MQ)	12,713,669	12,693,094	12,808,266
Income (Reserve, Grants, MQ UOS)	2,649,200	7,791,666	10,256,000
<b>TOTAL BUDGETED REVENUES AND INCOME</b>	<b>15,362,869</b>	<b>20,484,760</b>	<b>23,064,266</b>

<b>Budget</b>	<b>Budgeted FY 2018/2019</b>	<b>Budgeted FY 2019/2020</b>	<b>Proposed FY 2020/2021</b>
<b>Operating Budget</b>			
Staff Costs – Salaries and Benefits	4,827,979	5,452,726	6,350,818
Administrative Operations	1,295,444	1,478,955	1,617,770
Field Operations	655,578	554,264	1,056,351
Public Affairs	409,296	495,200	531,451
Planning & Capital Improvements	837,565	552,635	116,095
Land Conservation & Grant Management		297,100	783,140
Board	25,271	27,958	32,180
Elections	400,000	100,000	815,000
<b>Total Operating Budget</b>	<b>8,451,133</b>	<b>8,958,838</b>	<b>11,302,805</b>
<b>Capital Budget</b>			
Land Acquisition	4,345,000	6,828,000	6,035,000
Capital/Structural Improvement	879,500	1,955,000	3,247,000
Capital Purchases	60,000	80,000	371,000
<b>Total Capital Budget</b>	<b>5,284,500</b>	<b>8,863,000</b>	<b>9,653,000</b>
<b>Authority Grant Programs</b>			
20% Funding	150,000	140,000	-
Urban Open Space Grant Allocation	500,000	700,000	500,000
Urban Open Space Grant Awards	500,000	1,000,000	1,000,000
<b>Total Authority Grant Programs Budget</b>	<b>1,150,000</b>	<b>1,840,000</b>	<b>1,500,000</b>
<b>TOTAL BUDGET</b>	<b>14,885,633</b>	<b>19,661,838</b>	<b>22,455,805</b>

Table 9

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**PART II**  
**THE ANNUAL**  
**WORK PLAN**



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## **Work Plan Development Process**

The Santa Clara Valley Greenprint, the Measure Q Expenditure Plan and the Open Space Authority 5 Year Plan (5 Year Plan) provide guidance on goal setting and project decision making. The first document to guide the Authority was the 5 Year Plan first created in 1996. It was developed with input from the public and the Authority's Citizens' Advisory Committee (CAC) to serve as a guide for the Authority and inform the public of the Authority's roles, policies, and activities. In March 2014, the Board approved the Santa Clara Valley Greenprint (Valley Greenprint), a 30-year vision for conservation in Santa Clara Valley. This document was the basis for the Measure Q Expenditure Plan (Expenditure Plan), the document that guides the Authority on the use of Measure Q funds. The high priority potential projects listed in the Expenditure Plan are the result of a broad public engagement process to create a shared vision for the future of the region's open space.

Major program areas identified in the Expenditure Plan and Valley Greenprint include:

- Land Protection and Conservation Initiatives
- Visitor Use, Facilities, and Capital Improvements
- Natural and Cultural Resource Management
- Community Engagement and Investments in Urban Communities

During the work plan development process, the Authority's Strategies and Objectives document ([Appendix A](#)), which provides high-level direction for the Annual Work Plan, is reviewed and updated accordingly. Department managers begin developing the Annual Work Plan in accordance with the strategies and objectives defined in the document. The consolidated list of proposed projects is then reviewed by executive management before being presented to the Board during a publicly-noticed Board Workshop, where the Board reviews and discusses the priorities and projects.

### **Priority Tier Determinations**

The Annual Work Plan is comprised of the projects and initiatives that the Authority will pursue and dedicate funds and/or extensive staff time in the upcoming fiscal year. The Annual Work Plan typically includes strategic or urgent projects that have broad support from the public and conservation partners, including those with secured grant funding.

To best evaluate which projects to include in the Annual Work Plan, Staff refers to the Strategies and Objectives and utilizes a tiering system to prioritize projects.

**Tier 1** projects represent the top priorities that are already underway, will be actively executed during the fiscal year, or have an impending deadline during the fiscal year or within six months after fiscal year end, whether it was imposed by a regulatory body, grant and/or partner obligations, contractual terms, or immediate need for public safety. Additionally, these projects strongly align with the current priority initiatives and goals, are timely opportunities to move forward in part or in whole a regionally significant plan or may present a greater opportunity loss or potential negative implications if the Authority does not undertake the project.

Projects categorized under this tier are presented in the Annual Work Plan with the proposed FY 2020/2021 project budget and the associated milestones for the year.

**Tier 2** projects are longer-term priorities in line with the goals and objectives defined in the Strategic Plan but may not necessarily be pursued in the upcoming fiscal year.

Projects categorized under this tier may not have a clearly defined scope of work, a completion date that may be indeterminable, and/or there is no funding source available. Tracking a list of projects under this tier allows the Authority to maintain a record of the public and the Board's requests and needs.

A list of Tier 2 projects can be found in [Appendix B](#).

## FY 2020/2021 Annual Work Plan

The Annual Work Plan seeks: (1) to best reflect the extensive, everyday cross-functional collaboration Authority staff engages in throughout the course of their work, (2) to increase accountability and transparency with the introduction of milestones, and (3) to provide the Board and the public with the “whole” purpose of a project by aligning it to the Authority’s Strategies and Objectives.

The Authority’s Annual Work Plan is presented by strategy. Projects under the same strategy are grouped by objectives.

### *How to Read the Annual Work Plan*

Projects are grouped by *Objectives*. Objectives are defined in the Strategies and Objectives document ([Appendix A](#)).

While projects can be supported by a cross-functional team, each project is assigned a *Department Lead*.

- CIG –Conservation Initiatives & Grant Management department
- PLN – Planning & Capital Improvements department
- PUB – Public Affairs department
- FLD – Field Operations department
- ADM – Administrative Operations department

The *Project Name* is the internal name referred to by staff.

The *Project Description* is the summary of the project’s overall scope and deliverable.

The *Fiscal Year Scope of Work* column summarizes a bullet list of measurable milestones staff expects to achieve.

The *Proposed Project Budget* is the estimated net project cost to the Authority for fiscal year 2020/2021. The estimated project budget does not include staff time. Estimated project budgets with an asterisk denotes the project will be partially or wholly offset with partner funding and/or grants.

New projects introduced in the Annual Work Plan are shaded in **light green**.

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**STRATEGY ONE**

**Identify and permanently protect critical natural and working lands and natural infrastructure to ensure environmental sustainability and promote climate resilient communities**

Pursue permanent protection of open space and agricultural lands through implementation of the Valley Greenprint including acquisitions, conservation easements, policy protections, and associated stewardship

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY20/21 Project Budget
CIG	Priority Land Acquisitions	Work under this project includes identification of land acquisition preservation opportunities in the Conservation Focus Areas as outlined in the Santa Clara Valley Greenprint. Prior to identification of a specific acquisition site, scope of work includes conducting preliminary due diligence, engaging with willing sellers, and performing early analysis of site/local resources and internal evaluation to determine if a potential acquisition meets the Authority's criteria for purchase. Due to the confidential nature of ongoing negotiations, property names, property owner(s) information, and other details are withheld.	The Authority is currently participating in various stages of negotiation for acquisition of fee title, conservation easement, or other interest in eleven (11) properties totaling approximately 5,200 acres, with a roughly estimated market value of over 60 million dollars, not including the Five Wounds Trail and San Martin Agricultural Conservation Easements described in this work plan. Typical of real property negotiations, these projects can span multiple years and discussions with landowners may start and stop. This work is dynamic, as landowners and conservation partners approach the Authority over the course of each year to explore the agency's interest in participating in new transactions.	5,500,000*
CIG	Five Wounds Trail Right of Way Acquisition	In partnership with Santa Clara County Parks and the City of San Jose, the County and Open Space Authority will hold a conservation easement over this initial acquisition and secure remainder of trail corridor to Berryessa BART, including ensuring collaboration on design and planning on portions where acquisition may not be possible.	<ul style="list-style-type: none"> <li>Complete acquisition of five parcels between Williams and Whitton with conservation easement held by Authority/County and a Right of First Refusal on the remaining corridor parcels.</li> </ul>	500,000
FLD	Fisher's Bend/Fisher Flats Management Plan	Short-term land management and habitat enhancement planning and implementation in coordination with Peninsula Open Space Trust (POST)	<ul style="list-style-type: none"> <li>Complete transaction to transfer management of Fisher's Bend/Fisher Flats</li> </ul>	35,000

**Santa Clara Valley Open Space Authority**

APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

Work with partners to develop and implement local, regional, and statewide conservation initiatives to preserve and restore natural and working lands for environmental, climate, community, and economic benefits

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY20/21 Project Budget
CIG	Santa Clara Valley Agricultural Plan	The Santa Clara Valley Agricultural Plan is a regional conservation effort led by Santa Clara County and the Santa Clara Valley Open Space Authority to protect Southern Santa Clara County’s important farm and rangelands to mitigate future effects of climate change and support economic viability of agriculture.	<ul style="list-style-type: none"> <li>• Develop eligibility and prioritization criteria for Agricultural Conservation Easements (ACE).</li> <li>• Explore other tools to complement the ACEs.</li> <li>• Develop a template ACE.</li> </ul>	15,000
CIG	Resilient Cities and Rural Areas	With funding from the Silicon Valley Community Foundation Donor Circle for the Environment, the Authority, San Francisco Estuary Institute (SFEI), and San Francisco Bay Area Planning and Urban Research Association (SPUR) to identify significant opportunities in San Jose where green infrastructure investments can promote environmental health and climate resilience. This project will develop and apply a planning framework using the City of San Jose and its surrounding rural landscapes as a case study to demonstrate how the framework could be applied in other cities in the Bay Area. This is a two-year project that will span FY 2019/2020 to FY 2020/2021.	<ul style="list-style-type: none"> <li>• Produce report that describes initial climate resilience framework and recommendations for and potential resilience projects and policies in San Jose</li> </ul>	0*
CIG	Climate Smart San Jose Plan	In partnership with San Jose, the Authority will help quantify the greenhouse gas emission impacts of potential land use scenarios and identify carbon sequestration opportunities associated with management of natural and working lands.	<ul style="list-style-type: none"> <li>• Work with City to develop and publish Natural and Working Land element for CSSJ Phase 2</li> </ul>	80,000
CIG	Coyote Valley Groundwater Sustainability Report	The conservation easement the Open Space Authority holds over the Tulare Meadows property requires development of a groundwater assessment to understand relationship between groundwater pumping around the conservation property and the sustainability of groundwater dependent ecosystems and creek baseflows. Cost will be shared by the Authority, POST and City of San Jose.	<ul style="list-style-type: none"> <li>• Securing jointly approved groundwater expert consultant</li> <li>• Initiate groundwater assessment and necessary data collection</li> </ul>	100,000*

**Santa Clara Valley Open Space Authority**

APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

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Plan and implement multi-benefit land conservation projects to secure permanent protection of Coyote Valley

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY20/21 Project Budget
CIG	Coyote Valley Vision Plan	A master vision plan for Authority and partner-owned conservation lands in Coyote Valley as implementation to the 2017 Coyote Valley Landscape Linkage Report. The plan will set forth landscape scale strategies and site-specific implementation actions for integrating multi-benefit values and features with the goal of long-term conservation and ecological restoration.	<ul style="list-style-type: none"><li>• Develop project scope of work</li><li>• Issue RFP for master planning, public outreach, and communications</li><li>• Initiate master planning process</li><li>• Begin site inventories and assessments</li></ul>	500,000

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**STRATEGY TWO**

**Connect people to the land by integrating “light on the land” public access facilities with preservation and education of natural and cultural landscapes**

Prepare and implement strategic long-range use and management plans for Authority lands and public access facilities that promote environmental sustainability and climate resilience

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY20/21 Project Budget
PLN	Five Year Capital Improvements Plan	Develop a plan to document priority capital projects and associated budgets.	<ul style="list-style-type: none"><li>• Develop project scope of work</li><li>• Solicit input on priority projects from Staff, CAC, and Board</li><li>• Develop budgets and phasing for priority projects</li></ul>	0

## Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

Plan and implement a capital improvement program that promotes sustainability and is responsive to the Authority's mission

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY20/21 Project Budget
PLN	Rancho Cañada del Oro Public Access	Development of a plan for a new ADA accessible interpretative day-use-area accessed via a pedestrian bridge crossing over Llagas Creek. Enhance public event and operational access to Blair Ranch area within the Rancho Cañada del Oro Open Space Preserve.	<ul style="list-style-type: none"> <li>• Develop construction documents</li> <li>• Permitting</li> <li>• CEQA compliance</li> <li>• Seek grant funding for construction costs</li> <li>• Determine scope of work for analyzing roads and trails on Blair Ranch</li> </ul>	150,000
PLN	Coyote Valley Open Space Preserve Improved North Meadow Public Access	Provide an ADA accessible trail and public amenity areas along the Heart's Delight Trail in the North Meadow. Project includes upgrades to existing equestrian parking area. Anticipated to be complete for public use by 2021.	<ul style="list-style-type: none"> <li>• Develop construction documents</li> <li>• Permitting</li> <li>• CEQA compliance</li> <li>• Initiate construction contract</li> <li>• Seek grant funding for construction costs</li> <li>• Begin construction (if timing and permitting allows)</li> </ul>	400,000*
PLN	Coyote Ridge Open Space Preserve Public Access	Planning, permitting, environmental compliance and design for public access improvements to include a parking area at Malech Road, interpretive and education stations and opening of the first segment of the Bay Area Ridge Trail for guided access. Anticipated to be complete for public use by 2022.	<ul style="list-style-type: none"> <li>• Develop construction documents</li> <li>• Permitting</li> <li>• CEQA compliance</li> <li>• Initiate construction contract</li> <li>• Seek grant funding for construction costs</li> <li>• Begin construction (if timing and permitting allows)</li> </ul>	1,800,000*
FLD	Pajaro River Ag Preserve Habitat Improvements	Install wildlife fencing to prevent intrusions of wildlife into row crop areas to promote native habitat and provide for food safety. Repair and replace critical water delivery infrastructure.	<ul style="list-style-type: none"> <li>• Release Request for Bids</li> <li>• Complete fence</li> <li>• Repair water infrastructure</li> </ul>	100,000*
FLD	Boundary Fencing at North Coyote Valley Properties	Install boundary fencing (Split Rail or similar wildlife friendly design) and gates around the perimeter of the North Coyote Valley properties where necessary to deter trespassing and prevent vehicular access.	<ul style="list-style-type: none"> <li>• Purchase materials</li> <li>• Construct fence along Monterey Road</li> </ul>	60,000

**Santa Clara Valley Open Space Authority**

APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

Maintain and enhance existing Authority facilities and assets in an environmentally responsible manner

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY20/21 Project Budget
ADM	33 Las Colinas Facilities Maintenance and Improvements	Maintain the integrity, ensure the life span, and improve the environmental impact of the Authority’s headquarters facilities at 33 Las Colinas through regular assessments, maintenance, repairs, and replacements as needed.	<ul style="list-style-type: none"> <li>Seal roof deck seams to eliminate leaks</li> <li>Reconfigure planks around ramp to reduce pooling of rainwater</li> </ul>	17,000
PLN	ADA Transition Plan	Develop an ADA transition plan for Authority facilities, programs, and public outreach. Report will provide recommendations for phasing and implementation.	<ul style="list-style-type: none"> <li>Develop scope of work for project</li> <li>Issue RFP for consultant(s) to prepare Transition Plan</li> <li>Develop draft ADA Transition Plan</li> </ul>	100,000
ADM	Office Space and Resource Planning	Maximize the available office and workspaces and systems for future staffing and operating needs.	<ul style="list-style-type: none"> <li>Engage consultants to complete planning, design, procurement, and installation of new furniture to make new workstations/workspaces</li> <li>Assess current VoIP to see if it meets agency needs for the next 5 years and upgrade or propose replacement based on findings</li> <li>Assess network infrastructure for new workstations/workspaces</li> </ul>	175,000

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**STRATEGY THREE**

**Manage and steward the Authority’s natural and cultural resources to ensure long-term viability and climate resilience of native ecosystems**

Utilize climate-smart principles and best practices to promote and steward natural and cultural landscapes and communities

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY20/21 Project Budget
FLD	Blair Ranch Pond Habitat Enhancement	Enhance and restore at-risk breeding pond habitats to protect California red-legged frogs and enhance climate resiliency at Rancho Cañada del Oro Open Space Preserve	<ul style="list-style-type: none"> <li>• Submit permits to VHA and RWQCB</li> <li>• 95% designs completed</li> <li>• File CEQA document</li> </ul>	55,000
FLD	Fisher Creek Riparian Habitat Restoration	Develop and implement plan to restore a wetland buffer zone around the Fisher's Bend property	<ul style="list-style-type: none"> <li>• Prepare site for restoration</li> <li>• Develop planting plan</li> <li>• Plant with schoolkids</li> </ul>	220,000*
FLD	Pajaro River Riparian Restoration Project	Restore stream habitat by reshaping stream bank, removing invasive species, and planting climate-smart riparian species along .75-mile of the Pajaro River on the Pajaro River Agricultural Preserve South Property to benefit wildlife habitat and water quality. Partner with Point Blue Conservation Science’s Students and Teachers Restoring a Watershed (STRAW) program to provide outdoor environmental education opportunities for school kids.	<ul style="list-style-type: none"> <li>• Develop planting plan</li> <li>• Initiate permits for streambank grading</li> <li>• Begin feasibility studies for confluence wetland creation</li> </ul>	10,000

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Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY20/21 Project Budget
FLD	Coyote Ridge Open Space Preserve Grazing and Habitat Improvements	<p>Implementation of grazing infrastructure and habitat improvements across 4,160 acres at Coyote Ridge that includes the Authority’s Preserve as well as Santa Clara Valley Water District (SCVWD) and Valley Transportation Authority (VTA) lands. Conservation grazing on Coyote Ridge focuses on reducing the severity and extent of invasive species, enhancing the ecosystem health of grasslands, promoting native plant species, and maintaining habitat for native grassland species and other threatened species such as the Bay checkerspot butterfly. This project is funded by the Central Valley Project Conservation Program and Central Valley Project Improvement Act Habitat Restoration Program, the Valley Habitat Agency (VHA), VTA, and SCVWD, and is being implemented in partnership with the VHA. This project will support grazing efforts and enhance 45 acres of wetlands, riparian corridors, and adjacent upland habitat by installing exclusion fencing, replacement of aging pasture and boundary fences, and installing/replacing springs and troughs.</p>	<ul style="list-style-type: none"> <li>• Release RFB for fence improvements</li> <li>• Initiate fence replacement</li> <li>• Initiate permitting for spring or well development</li> </ul>	400,000*

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Provide leadership and resources for land stewardship through policies, partnerships, and regional planning that incorporate changing climatic conditions and climate resilience

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY20/21 Project Budget
FLD	Fuels Management Plan	Develop a wildlands fuel management policy and plan that will define fuel management goals and objectives, identify, and prioritize fuel reduction treatments, and describe methods that reduce wildfire risk and achieve natural resource goals across Authority lands.	<ul style="list-style-type: none"> <li>• Contract with a consultant to determine scope of work for developing a fuels management plan</li> </ul>	25,000
FLD	Integrated Pest Management Program	Develop an Integrated Pest Management (IPM) Program and Policy to guide the Authority's work to address control of invasive plants and animals within the Authority's preserves and facilities	<ul style="list-style-type: none"> <li>• Certify CEQA document, IPM Manual, and IPM Policy</li> <li>• Hold Release Draft PEIR</li> <li>• Develop Mitigation and Monitoring Plan</li> <li>• Hold public hearing</li> <li>• Receive Board approval of policy and manual and certify CEQA documents</li> </ul>	25,000

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**STRATEGY FOUR**

**Promote resilient urban communities through strategic partnerships and investments in nature**

Improve equitable access to nature in urban areas and build community climate resilience through investment in urban open spaces and nature-based climate adaptation strategies in the urban matrix

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY20/21 Project Budget
CIG	Replace Existing Grant Management Software	The Urban Grant Program uses grant management software to manage grant application submission, application review, and post-award payments and reporting. Due to a number of bugs that have surfaced over time, as well as the need for increased capacity to accommodate a larger number of grants, the Authority is seeking an alternate software solution for the administration of the grant program.	<ul style="list-style-type: none"><li>• Determine future grant management software needs</li><li>• Research and select grant management software</li><li>• Install and migrate current grantee data</li><li>• Deploy new grant management software</li><li>• Provide training for grantees on new software</li></ul>	25,000

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Build public awareness of the benefits of nature and natural infrastructure to bring greater climate resilience to the community and region

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY20/21 Project Budget
PUB	Investing in Nature Initiative	Finalize and implement a strategic plan for expanding on the Measure Q brand and folding in the full breadth of the Authority's work, so that the agency's future investments in nature are communicated consistently, without reliance on a single ballot measure	<ul style="list-style-type: none"><li>• Completion of the implementation of Investing in Nature, through messaging and public rollout via various communications channels</li></ul>	10,000
PUB	Agency Branding Standards	Establish standards for communication materials to present a consistent brand for the Authority	<ul style="list-style-type: none"><li>• Update the Authority's public facing maps and establish a brand consistency</li></ul>	10,000

**STRATEGY FIVE**

**Position the agency as a leader in organizational, financial, and environmental sustainability**

Ensure financial sustainability by implementing funding strategies and fiscal policies to advance climate smart priorities that safeguard the ability of future generations to benefit from the Authority’s mission

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY20/21 Project Budget
ADM	Long-term Funding Mechanisms	Develop and implement a strategic funding plan that includes the timing of and potential funding mechanisms for operations and maintenance of the agency’s growing system of lands and future capital expenditures	<ul style="list-style-type: none"><li>• Conduct polling to determine feasibility</li><li>• Ad Hoc Committee recommendation to the Board and seek budget amendment as appropriate</li></ul>	0

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Nurture an inclusive and diverse workforce through intentional staffing and retention strategies to create a legacy of environmental champions

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY20/21 Project Budget
ADM	Strategic Staffing Plan	Develop, implement, and maintain strategic staffing plan that addresses the agency’s priorities, creates and supports an intentional culture, and engages and retains a skilled workforce	<ul style="list-style-type: none"> <li>• Implement updates to onboarding program</li> <li>• Update and implement Authority Orientation Guide</li> <li>• Finalize curriculum for Emerging Leaders Academy               <ul style="list-style-type: none"> <li>○ Create materials and/or engage trainers for Emerging Leaders Academy</li> <li>○ Implement Emerging Leaders Academy</li> </ul> </li> <li>• Respond to GM's input on benefit recommendations</li> <li>• Execute Class and Compensation study               <ul style="list-style-type: none"> <li>○ Review Class and Compensation results and make recommendation to GM and Board</li> <li>○ Implement GM- and Board-approved plan</li> </ul> </li> <li>• Standardize and formalize unpaid intern program</li> <li>• Assess current JEDI culture in Authority processes and policies               <ul style="list-style-type: none"> <li>○ Complete information gathering to determine course of action to create a plan in response to current status</li> </ul> </li> <li>• Implement regularly scheduled culture surveys and share results with Executive Team, Leadership Team, Staff and Board</li> </ul>	75,000



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Expand the use of efficient tools, technology and operational strategies that maximize our resources while minimizing environmental consequences

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY20/21 Project Budget
ADM	IT Master Plan	Develop a plan to document existing network infrastructure and configurations, collaboration and work tools, enterprise software, telecom services, group policies, and workflow processes and standards. The IT Plan will also include a roadmap to procure, implement, support, and maintain network systems and processes as the agency grows.	<ul style="list-style-type: none"> <li>• Publish Authority Information Technology Plan</li> <li>• Research and recommend agency-wide collaboration tools</li> <li>• Develop and document electronic file policies and protocols</li> <li>• Migrate to new file server</li> </ul>	15,000
ADM	Human Resources Processes	Assess current HR processes for opportunities to streamline and/or implement technology-based solutions	<ul style="list-style-type: none"> <li>• Select Human Resources Information System (HRIS)</li> <li>• Purchase HRIS</li> <li>• Install HRIS</li> <li>• Create training materials</li> <li>• Train staff to use new system</li> <li>• Implement HRIS</li> <li>• Transfer historical information into new system</li> </ul>	21,000
FLD	Field Operations Manual	Develop a Field Operations Manual to assist Field staff in the daily operation of tasks and duties necessary to fulfill the Authority's mission of providing a well-managed and safe Preserve system.	<ul style="list-style-type: none"> <li>• Compile information and create Field Operations Manual</li> </ul>	4,000
FLD	Parking Reservation System	Deploy a parking reservation system for the Open Space Authority's staging areas to reduce congestion and provide a quality experience for Preserve visitors	<ul style="list-style-type: none"> <li>• Research other agency programs</li> <li>• Release Request for Proposals for software and hardware solutions</li> <li>• Select parking reservation software provider</li> </ul>	150,000

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Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY20/21 Project Budget
CIG	Geographical Information System	<p>The Geographic Information Systems (GIS) Program supports nearly every aspect of the agency’s mission by providing accurate and up-to-date spatial data in the office and in the field. GIS analysis is required to confirm conservation values of potential land acquisition projects and to develop Preserve use and management plans. The GIS Program Development project is focused on developing new capabilities for collecting, maintaining, and hosting spatial data that can support operations in the office and field. The primary focus of the project is developing a 2-5-year development plan for the GIS program that increases overall staff efficiency and effectiveness by improving in-house hardware and developing a central online portal. The secondary focus of this project is to continue to develop novel and necessary spatial data to inform decisions.</p>	<ul style="list-style-type: none"> <li>• Implement central data portal to enhance the ability of Authority’s GIS to support various agency-wide programs and projects</li> <li>• Update and refine Authority GIS database</li> </ul>	25,000
ADM	Strategic Priorities	<p>Determine the Authority’s priorities and timelines to guide future acquisitions, public access plans, capital improvement priorities, and human resources required to execute the agency’s stewardship and operations for the next five years.</p>	<ul style="list-style-type: none"> <li>• Publish RFP for strategic planning consulting services and award contract</li> <li>• Form a cross functional Strategic Planning Team (SPT)</li> <li>• Host workshops with Board or subcommittee and SPT to develop the agency’s priorities for the next five years</li> <li>• Define objectives for future acquisitions, public access plans, and capital improvement priorities to fulfill</li> <li>• Determine staffing positions needed to implement objectives and maintain operations</li> <li>• Determine financial resources available for future projects</li> </ul>	50,000

**Santa Clara Valley Open Space Authority**

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Utilize a governance model that is guided by adaptive management practices and synergistic strategies to build organizational resilience

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY20/21 Project Budget
ADM	District of Distinction	Achieve the District of Distinction designation from California Special Districts Association (CSDA) to highlight our prudent fiscal and compliance practices to effectively operate and govern the agency	<ul style="list-style-type: none"><li>• Complete Board and Executive team training</li><li>• Submit financial documents and other requirements to CSDA</li><li>• Upon approval, post District of Distinction designation on website</li></ul>	4,500

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**Department Programs**

In addition to projects, each department engages in daily programmatic responsibilities in service of the Authority’s mission.

This section identifies each of the Authority’s departments, their core functions and list of programs, and summaries of the responsibilities within each program area.



**Land Conservation and Grant Management**

The Conservation Initiatives and Grant Management (CIG) Department is responsible for developing and implementing strategic conservation initiatives and projects to achieve the agency’s land preservation goals including those established in the Santa Clara Valley Greenprint. This work entails conservation planning to identify and prioritize the most important multi-benefit natural and working lands; partner engagement to develop coordinated land protection and funding strategies; review and development of statewide and local policies, programs and funding sources for land protection; and grant writing. Land acquisition including purchase of fee title or conservation easements is a key conservation strategy, and the Department is responsible for implementing all aspects of this program including landowner outreach and negotiation, appraisals, due diligence, and conservation easement stewardship in compliance with the agency’s accreditation status by the Land Trust Alliance. This work is supported by use of Geographic Information Systems (GIS) mapping software, and the Department also provides the administration, design and implementation of Authority’s GIS mapping and analysis services which supports all aspects of Authority work, including conservation planning, real property evaluations, acquisitions, community and media outreach and land management.

CIG programs include:

- Real Property
- Conservation Initiatives
- Grant Management

Real Property

The Real Property Program manages several initiatives that fulfill the Authority’s mission including:

- Conservation of strategic land through acquisition of fee title lands or conservation easements from willing sellers;
- Strong partnerships with other conservation organizations to purchase and manage preserved lands;
- Complex due diligence and related real property and site analysis to develop disposition plans for existing buildings, features and structures;
- Annual conservation easement monitoring and reporting; and
- Tracking market trends, issues, and opportunities related to land values and acquisition opportunities.

Staff strives to leverage the Authority’s funds through partnerships and grant funding. Land priorities are derived in part from the Valley Greenprint, which aims to implement the Authority’s mission and vision by protecting an interconnected network of parks, open space preserves, and well-managed agricultural lands. To achieve the maximum return on investment, land conservation priorities typically include properties with multiple conservation values, including natural habitat, water resources, agriculture, recreation, landscape connectivity, and significant climate resilience benefits.

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In addition to work plan projects, staff is also responsible for recurring tasks to support the program's initiatives:

- Responding to general inquiries from the public that pertain to planning, preserves, development applications, potential land sales;
- Negotiating real property agreements, including license and management agreements and agricultural leases; and
- Ensuring compliance with Land Trust Alliance best practices for land transactions and conservation easement stewardship.

#### Conservation Initiatives

The Conservation Initiatives Program includes several initiatives that fulfill the Authority's mission including:

- Authority-wide Geographic Information Systems ("GIS") infrastructure and data management, technical analysis and cartography;
- Regional conservation policy/planning analysis and strategic partnerships to advance implementation of the Santa Clara Valley Greenprint and related investments in natural and working lands for climate resilience;
- Technical land/water conservation analysis, coordination and implementation including mapping and communications; and
- Technical partnerships and outreach.

The Conservation Initiatives Program continues to support several critical projects to promote multi-benefit land conservation in the Coyote Valley and to preserve natural and working lands as a climate resilience strategy. The projects led under this program aim to have a direct, positive impact on Authority goals and may generate future funding for management of the Authority's lands in myriad ways, adding to the resilience and sustainability for future generations.

#### Grant Management

The Grant Management Program manages several initiatives that fulfill the Authority's mission including:

#### Grant Making

The Authority's two grant programs expand the Authority's ability to connect people to nature with a wide range of urban greening and protected public land projects in urban neighborhoods that have limited access to these resources. This work includes:

- Oversight of the Authority's Urban Grant Program which includes guideline development, solicitations and awards, contracting and project tracking;
- Oversight of the Authority's District 1 Assessment's 20% Funding Program; and
- Outreach and reporting on the Authority's grant programs.

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The administration of the Urban Grant Program includes overseeing grant agreements, processing disbursements, and maintaining the grants-tracking system. Staff time is expended supporting over two dozen current grantees, as well as supporting a grant cycle scheduled to award \$1,000,000 to local organizations and non-profits in the upcoming fiscal year. The Authority's 20% Funding Program continues to be a funding source for complex, multi-year urban open space projects for key partners within the Authority's jurisdiction.

### Grant Seeking

The Authority also seeks outside funding to support its projects and programs. This helps increase capacity to implement the Agency's mission by leveraging financial resources. This includes:

- Overall management of grant-seeking efforts including tracking opportunities and developing materials, as well as supporting grant application development; and
- Management of incoming grants for Authority projects.



## Planning and Capital Improvements

The Planning Department is responsible for the planning, design, and construction of capital improvement projects for visitor facilities and ecological restoration.

Programs within the Planning Department include:

- Planning and Capital Improvements

### [Planning and Capital Improvements](#)

The Planning and Capital Improvements Program manages several initiatives that fulfill the Authority's mission including:

- Development of policies and plans for the use and management of the Authority's properties, including mid and long-range strategic master plans, and capital improvement plans to inform future funding needs;
- Local and regional public access policy and planning, including collaboration on regional projects like the Bay Area Ridge Trail;
- Planning, design, and construction of public access facilities including trails, staging areas, signage, interpretive features and other public access-related facilities;
- Development of stakeholder and public outreach strategies and plans as part of project implementation;
- Ecological restoration, capital project planning, design, and construction including planning support for field operations and resource management; and
- Federal, state, and local environmental compliance and permitting.

In addition to the priority projects and other multi-year projects, staff is also responsible for:

- Reviewing and responding to local and regional policies and projects that may have an effect on Authority preserves;
- Participating in partner meetings and workshops to coordinate implementation of regional planning initiatives; and
- Working with the public affairs teams to integrate stakeholder outreach and feedback related to visitor uses and related projects.

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**Public Affairs**

The Public Affairs Department is responsible for the Authority’s communications and awareness building with the public and media, partnership building, and legislative affairs which includes policy and long-range funding source development.

More specifically, the department is responsible for managing all of the Authority’s digital and print media and communications - including formal reports, periodic digital publications, Year in Review, trail maps and other brochures, website, social media, blog posts, and press relations. The department also focuses on building key strategic partnerships locally and around the State, engaging on legislative, policy, and public funding matters that support the agency’s mission, and staying in close touch with elected leaders at all levels of government.

Programs within the Public Affairs Department include:

- Legislative Affairs
- Partnership Development
- Media and Communications

Legislative Affairs

The Legislative Affairs Program is responsible for supporting legislation and policies important to the Authority’s work and helps to develop and support short- and long-range public funding programs, especially at the state level. The team builds and maintains relationships with elected officials, from local to national levels, including those serving in municipal, county, special district, regional, state, and federal offices.

Partnership Development

The Partnership Development Program is responsible for building and maintaining relationships with community leaders, organizations, and agencies whose goals overlap or mutually support those of the Authority.

Media and Communications

The Media and Communications Program is responsible for strategizing, writing, designing, and distributing news releases and responding to media inquiries, preparing online newsletters and periodic Open Space Bulletin emails, enhancing and managing the Authority’s website and other social media platforms, and developing content and graphics for brochures, reports, and event collateral to build awareness about the Authority’s mission. Strategic communications that continually seek to expand the Authority’s reach and capture new and emerging audiences are vital to keeping the Authority’s constituents, partners, and stakeholders informed of its important mission and accomplishments.

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## Field Operations

The Field Operations Department oversees the daily operation, management and stewardship of the Authority's lands and public access facilities. Responsibilities include trail and preserve maintenance, resource management such as grazing management, invasive plant management, site monitoring, resource and habitat enhancement, monitoring and maintaining capital structures, and careful stewardship and reporting for contract land management and mitigation.

Programs within the Field Operations Department include:

- Land Management and Operations
  - Visitor Use/Public Access Facilities
  - Natural Resource Management
  - Contract Land Management
- Community Engagement
  - Environmental Education
  - Volunteer Programs and Activities
  - Outreach and Events

### Land Management and Operations

The Land Management and Operations Program is engaged with maintaining and managing the Authority's preserves by servicing Authority fleet vehicles associated with the daily operation of the Authority's preserves, managing grazing licenses on over 8,000 acres to provide vegetation management of Authority grasslands and reduce the threat of wildfires, maintaining preserve roads to help in the management of Authority properties and provide responding emergency vehicle access, and patrolling Authority properties to ensure the security and protection of the land and to identify projects to repair and/or enhance the infrastructure or natural environment.

The Land Management Team also closely engages with the public – providing visitors with information about the Authority and its mission and the lands it owns, educating visitors about the natural landscape, the trails, and the animals on the preserves, and building community involvement and communications with property owners that are adjacent or near to existing Authority Preserves through outreach and projects that affect the community as a whole.

#### Visitor Use/Public Access Facilities

The Public Access Facility Program is responsible for maintaining Authority visitor areas through general care of preserve staging areas, including the maintenance and servicing of restrooms, striping of parking stalls, care of asphalt surfaces, and removal of trash. Additional responsibilities include maintaining and enhancing public access infrastructure improvements to provide an exceptional experience to users of Authority trails. Tasks include the routine care of trail tread, vegetation control (whipping and brushing) and the enhancement of trails to prevent damage from user impacts during winter use. In addition to

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the general maintenance items previously listed the team also gathers use data for each of its Preserves. Current data has shown a yearly increase in the number of visitors to each of the Authority's Preserves since inception of data collection five years ago. With current visitation reaching as high as 325,000 visitors per year, increased visitation has led to additional maintenance requirements for all the Authority's public access facilities along with additional time commitments from staff to assist visitors at the preserve staging areas.

### Natural Resource Management

The Natural Resource Management Program is responsible for enhancing natural resources within Authority lands. Initiatives and tasks include:

- Long term protection and stewardship of the lands, waters and habitats that the Authority owns and manages, or manages under contract for other agencies;
- Inventory and analysis of Authority-wide natural and cultural resources including compliance with applicable laws and regulations;
- Authority representation within the region and state on all relevant resource matters;
- Planning, design and execution of natural and cultural resource-related field projects that enhance and restore or rehabilitate resources; and
- Natural and cultural resource-related policy analysis, education, and outreach.

In addition to the priority projects and other multi-year projects, staff is also responsible for:

- Conducting annual management and monitoring reports as required by partner agencies for mitigation lands i.e. Valley Habitat Agency and Santa Clara Valley Water District
- Providing environmental compliance and field team support for a wide range of on-the-ground programs such as invasive species control, grazing and wildland fire prevention
- Working with field staff to implement projects covered under our California Department of Fish and Wildlife 1600 permits for routine maintenance of covered sites
- Reviewing special use permits for use of Authority lands
- Leading natural resource-focused tours and presentations
- Management of natural resource geographical information system (GIS) database

### Contract Land Management

The Contract Land Management Program is responsible for providing contract land management services to partner agencies in the management of adjoining lands to Authority preserves that provide an ecosystem level approach to Land Management. Tasks include routine property patrols, grazing management, invasive species management, and site monitoring.

## **Community Engagement**

### Environmental Education

The Environmental Education Program creates and offers educational programming for the public to help connect local students and learners of all ages with nature. These programs include free public activities and field-trips for school and community groups. The Authority also offers educational materials that teachers can use to help plan lessons on local history, wildlife, and ecology.

### Volunteer Programs and Activities

The Volunteer Programs and Activities Program encourages active public participation in the stewardship of Authority lands, provides public education of open space goals, and encourages appropriate community use of open lands. Staff manages docents, land stewards, outreach, and trail patrol volunteers, providing field operations and communications support for preserve maintenance and special projects. Given the depth of engagement with the agency that dedicated volunteers represent, this is a vital program for building community support and inspiring the conservation leaders of tomorrow.

### Outreach and Events

The Outreach and Events Program handles the logistics and preparation of large-scale events offered to the public by the Authority, as well as oversees the selection and participation of strategically selected booth events with local organizations and agencies.

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## Administrative Operations

The Administrative Operations Department is responsible for the management and oversight of functions that support the daily operations of the Open Space Authority, including human resources, records management, risk mitigation, safety, office and facilities, information and communication technology, accounting, and finance to ensure the stability and sustainability of the agency. The Department provides necessary operational services for the optimal, smooth functioning of the agency and strives for organizational excellence through continuous improvement and cross-department collaboration by taking a leadership role in achieving organization-wide operational efficiencies. The Department also oversees all governance, transparency and Board and committee administration.

Program areas in the Administrative Operations Department include:

- Human Resources
- Records Management
- Risk Management
- Office and Facilities Management
- Governance and Transparency
- Information Technology
- Accounting and Finance

### Human Resources

The Human Resources Program provides general human resources administration, orientation development and delivery, benefit and program analysis, recruitment, offer administration, performance evaluation management and tracking, class and compensation oversight, HR policy creation and oversight, HR process creation and oversight, and management of the program's budget.

The program is also responsible for overseeing the Authority's Human Resources database, including general administration and maintenance.

In coordination with the Accounting and Finance Program, the Human Resources Program manages employee benefits processing, PERS administration, FMLA/CFRA administration, and leave time accrual calculations.

The Program includes developing and maintaining an intentional culture to promote collaboration, respect, integrity, and accountability. The Program also includes overseeing workforce and organization development, intentionally focusing on developing skills, competencies, and leadership growth for staff and managers through various training modules such as best practice supervision skills, mandatory training, Authority culture and emotional intelligence.

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### Records Management

The Records Management Program oversees the Authority's Records Management Policy and its implementation, providing staff with guidelines and standards on the Authority's process of hard copy and electronic file management, archiving, and destruction.

The Program is responsible for the maintenance and safekeeping of vital records, preparing and scheduling archives to offsite storage, as well as recalling files for review and destruction.

### Risk Management

The Risk Management Program is responsible for the renewal and maintenance of the Authority's liability, property, and workers' compensation insurance coverage and claims, as well as overseeing and tracking safety training for all staff and developing and maintaining an emergency plan for all Authority locations.

### Office and Facilities Management

The purpose of the Office and Facilities Management Program is to track and monitor office equipment leases and oversee the procurement of office and kitchen supplies, office consumables, copy room supplies and services, furniture, and office equipment. Additionally, the program is responsible for welcoming office visitors, resolving inquiries from the public, meeting room coordination, and agency fleet coordination.

The Office and Facilities Management Program is also tasked with maintaining the Authority's headquarters building, which includes coordination of vendors providing landscaping services, building repairs, and facilities maintenance and managing the program's budget. The Program is responsible for ensuring permits are up-to-date and emergency lights, fire sprinklers, and other building requirements are tested and meet required codes.

### Governance and Transparency

The Governance and Transparency Program is responsible for the timely preparation of Board and committee agendas and packets, report writing and processing, resolution writing and processing, minute taking and preparation, managing upcoming agenda items, public noticing, oversight of the legislative management system, and managing the program's budget.

The Clerk's Office is responsible for processing documents related to the Conflict of Interest Code, the Brown Act, and the Public Records Act, as well as maintaining the Authority's certifications for Transparency and District of Distinction.

The Clerk also oversees Board elections, Board appointments, committee recruitment and appointments, onboarding Board and committee members, Board policy updates, providing Directors with support, development and training tools upon request, and acts as a liaison between the Board and Authority staff.

### Information Technology

The Information Technology Program includes overseeing the maintenance and support of the Authority's file server, computer hardware, computer software, and other network peripherals;

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developing and maintaining general IT policies and procedures; firewall and security oversight; web server support; file storage management; remote access/VPN security; and data backup.

Staff also provides general desktop support to employees, and assists with new computer setup, domain and email account setup, and new user orientation.

### Accounting and Finance

The Accounting and Finance Program is responsible for the tracking, analysis, management and reporting of all financial processes such as accounts receivable, accounts payable, cash flow and bank reconciliations, budget development, purchasing, contract and request for proposals oversight, payroll, process and guideline development, policy creation and updating, general ledger, Measure Q expenditure tracking and reporting, expense reimbursement, and W2 reporting. Staff provides support and training for the Authority's financial accounting software, Acumatica, and works with the software consultant to maintain and configure the system as needed.

The Program is also responsible for preparing and filing mandatory reports, such as quarterly financial reports, annual independent financial audit, federal single audits, State Controller's Office compensation report, annual District 1 engineer's report, and the annual Measure Q Status Report.

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# PART III APPENDICES



- A. Strategies and Objectives
- B. Tier 2 Projects
- C. 2020/2021 Budget Details
- D. 2020/2021 Salary Pay Plan

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## Appendix A: Strategies and Objectives

### Strategy 1 – Identify and permanently protect critical natural and working lands and natural infrastructure to ensure environmental sustainability and promote climate resilient communities

- Objective 1 – Pursue permanent protection of open space and agricultural lands through implementation of the Valley Greenprint including acquisitions, conservation easements, policy protections, and associated stewardship
- Objective 2 – Work with partners to develop and implement local, regional, and statewide conservation initiatives to preserve and restore natural and working lands for environmental, climate, community, and economic benefits
- Objective 3 – Plan and implement multi-benefit land conservation projects to secure permanent protection of Coyote Valley
- Objective 4 – Engage in scientific research and data collection efforts to identify and prioritize investments in landscapes that have multiple conservation values including climate resilience benefits

### Strategy 2 – Connect people to the land by integrating “light on the land” public access facilities with preservation and education of natural and cultural landscapes

- Objective 1 – Prepare and implement strategic long-range use and management plans for Authority lands and public access facilities that promote environmental sustainability and climate resilience
- Objective 2 – Plan and implement a capital improvement program that promotes sustainability and is responsive to the Authority’s mission
- Objective 3 – Maintain and enhance existing Authority facilities and assets in an environmentally responsible manner

### Strategy 3 – Manage and steward the Authority’s natural and cultural resources to ensure long-term viability and climate resilience of native ecosystems

- Objective 1 – Utilize climate-smart principles and best practices to promote and steward natural and cultural landscapes and communities
- Objective 2 – Provide leadership and resources for land stewardship through policies, partnerships, and regional planning that incorporate changing climatic conditions and climate resilience

### Strategy 4 – Promote resilient urban communities through strategic partnerships and investments in nature

- Objective 1 – Improve equitable access to nature in urban areas and build community climate resilience through investment in urban open spaces and nature-based climate adaptation strategies in the urban matrix
- Objective 2 – Engage the public, with an emphasis on diversity, under-resourced communities, and youth, through volunteer, outreach, and environmental education programs
- Objective 3 – Build public awareness of the benefits of nature and natural infrastructure to bring greater climate resilience to the community and region

### Strategy 5 – Position the agency as a leader in organizational, financial, and environmental sustainability

- Objective 1 – Ensure financial sustainability by implementing funding strategies and fiscal policies to advance climate smart priorities that safeguard the ability of future generations to benefit from the Authority’s mission
- Objective 2 – Nurture an inclusive and diverse workforce through intentional staffing and retention strategies to create a legacy of environmental champions
- Objective 3 – Expand the use of efficient tools, technology and operational strategies that maximize our resources while minimizing environmental consequences
- Objective 4 – Utilize a governance model that is guided by adaptive management practices and synergistic strategies to build organizational resilience



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**Appendix B: Tier 2 Projects**

Project Name	Project Description
33 Las Colinas Facilities Improvements	<ul style="list-style-type: none"> <li>• Rezone A/C vents to improve ventilation and prevent fumes coming from the warehouse from entering office areas</li> <li>• Paint and seal the parking lot planters. Cap planters to prevent debris from collecting inside but allow the option to add potted plants when desired</li> <li>• Electric vehicle chargers</li> </ul>
Palassou Ridge Open Space Preserve Grazing Improvements	<ul style="list-style-type: none"> <li>• Scope the feasibility and cost of installing boundary fencing and other grazing infrastructure on the preserve</li> </ul>
Mobile Nature Center	<p>A mobile environmental learning center would allow the Authority to take education to communities where the barriers to access are high. It would also provide further outreach exposure and education opportunities through visiting schools, attending community events, and participating at events hosted by other agencies.</p>
Palassou Barn Roof Repair	<ul style="list-style-type: none"> <li>• Repair roof on Palassou barn and bat house</li> </ul>
Vilas House Demolition	<ul style="list-style-type: none"> <li>• Remove house at Vilas</li> <li>• Restore of house site and yard area</li> </ul>
Llagas Barn Demolition	<ul style="list-style-type: none"> <li>• Replace existing barn with prefabricated metal barn structure</li> </ul>
Vilas Runway Restoration	<ul style="list-style-type: none"> <li>• Identify runway removal constraints</li> <li>• Rehabilitate runway</li> <li>• Restore hydrology, grind asphalt, and other work as needed</li> </ul>
Blair Shed Electrical Improvements	<ul style="list-style-type: none"> <li>• Update and enhance electrical system in the Blair shed to fully utilize the 2000 sq ft space as a workshop for various land improvement projects</li> </ul>
Furtado Barn and House Improvements	<ul style="list-style-type: none"> <li>• Update and enhance electrical system in Furtado barn</li> <li>• Convert existing Furtado house into overnight camp area</li> </ul>
Regional Conservation Investment Strategy	<ul style="list-style-type: none"> <li>• The Authority will explore development of a pilot Mitigation credit agreement with CDFW to promote the conservation of species, habitats, and other natural resources and enable advance mitigation for public infrastructure projects.</li> </ul>
Palassou Ridge Open Space Preserve Access Feasibility Plan	<ul style="list-style-type: none"> <li>• Develop draft alternatives for event public access including programming, design requirements, environmental compliance, and budget needs.</li> </ul>
El Toro Open Space Preserve Management and Planning	<ul style="list-style-type: none"> <li>• Development of a public access and management plan for El Toro Open Space Preserve. The plan will identify possible trails, trailheads, and parking areas as well as signage and overall management of the preserve.</li> </ul>
Sierra Vista Open Space Preserve Backcountry Camp	<ul style="list-style-type: none"> <li>• In partnership with the Bay Area Ridge Trail Council and through funding from their donor, a small-scale backcountry (hike-in only) campground would be established for an urban wilderness experience at Sierra Vista Open Space Preserve. Planning and construction start dates unknown, and dependent on donor funding.</li> </ul>

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**Santa Clara Valley Open Space Authority**

APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

**Appendix C: 2020/2021 Budget Detail Report**

**FY2020/2021 Budget -- Full Detail**  
**FINAL**

	APPROVED FY20/21 District One	APPROVED FY20/21 Reserve	APPROVED FY20/21 Measure Q	APPROVED FY20/21 UOS	APPROVED FY20/21 Grants	APPROVED FY20/21 Budget TOTAL
<b>Income/Revenue</b>						
<b>INCOME SOURCES</b>	1,500,000	317,000	4,615,000	1,000,000		<b>7,432,000</b>
<b>5000 - REVENUES</b>						
5100 - Revenue	4,373,501	0	8,083,315	0	0	12,456,816
5101 - (Less) Funding Allocations	0	0	0	0	0	0
5200 - Interest Income	100,000	200,000	200,000	0	0	500,000
5300 - Grants	0	0	0	0	2,306,000	2,306,000
5400 - Donations	0	0	0	0	0	0
5500 - Land Sales	0	0	0	0	0	0
5600 - Land Use Income						
5601 - Lease Income	16,450	0	115,000	0	0	131,450
5602 - Grazing Lease Income	18,000	0	0	0	0	18,000
5603 - Use Permit Income	0	0	0	0	0	0
<b>Total Land Use Income</b>	<b>34,450</b>	<b>0</b>	<b>115,000</b>	<b>0</b>	<b>0</b>	<b>149,450</b>
5700 - Land Management Income						
5701 - VTA	0	0	0	0	0	0
5702 - SCVWD	0	0	0	0	0	0
5703 - Waste Management	0	0	0	0	0	0
5704 - Valley Habitat Agency	154,000	0	0	0	0	154,000
<b>Total Land Mgmt Income</b>	<b>154,000</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>154,000</b>
5800 - Rebates						
5801 - Cal Card Rebate Income	0	0	0	0	0	0
5802 - CSDA Card Rebate Income	0	0	0	0	0	0
5900 - Other						
5901 - Misc Income	0	0	66,000	0	0	66,000
<b>TOTAL INCOME SOURCES</b>	<b>6,161,951</b>	<b>517,000</b>	<b>13,079,315</b>	<b>1,000,000</b>	<b>2,306,000</b>	<b>23,064,266</b>

Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

**FY2020/2021 Budget -- Full Detail**  
**FINAL**

	APPROVED FY20/21 District One	APPROVED FY20/21 Reserve	APPROVED FY20/21 Measure Q	APPROVED FY20/21 UOS	APPROVED FY20/21 Grants	APPROVED FY20/21 Budget TOTAL
<b>Expense</b>						
<b>6000 - PAYROLL</b>						
6000 - General Manager	62,999	0	146,998	0	0	209,997
6002 - Manager(s)	366,929	0	451,491	0	0	818,421
6003 - Staff	1,393,038	0	2,029,796	0	0	3,422,834
6004 - Overtime	11,900	0	29,400	0	0	41,300
6005 - Seasonals	5,304	0	47,733	0	0	53,037
6006 - Stipends	12,900	0	0	0	0	12,900
<b>Total Payroll</b>	<b>1,853,070</b>	<b>0</b>	<b>2,705,418</b>	<b>0</b>	<b>0</b>	<b>4,558,488</b>
<b>6100 - BENEFITS &amp; EMPLOYEE EXPENSES</b>						
6110 - Health Insurance	440,074	0	677,807	0	0	1,117,881
6120 - Vision Care	2,153	0	2,976	0	0	5,129
6130 - Dental	27,188	0	38,004	0	0	65,192
6140 - Life Insurance	489	0	672	0	0	1,161
6150 - Employer Taxes	55,592	0	81,163	0	0	136,755
6160 - CALPERS Retirement Plan	179,294	0	284,816	0	0	464,110
6170 - 401A	3,937	0	9,187	0	0	13,125
6180 - Employee Assistance Program	533	0	745	0	0	1,278
6190 - Tuition Reimbursement	600	0	0	0	0	600
<b>Total Benefits and Employee Expenses</b>	<b>709,860</b>	<b>0</b>	<b>1,095,370</b>	<b>0</b>	<b>0</b>	<b>1,805,230</b>
<b>6200 - TRAVEL AND EXPENSES</b>						
6210 - Mileage Reimbursement	5,306	0	0	0	0	5,306
6220 - Travel Airfare	16,073	0	0	0	0	16,073
6230 - Travel Lodging	21,996	0	0	0	0	21,996
6240 - Travel Meals and Entertainment	7,605	0	0	0	0	7,605
6250 - Travel Transportation	4,010	0	0	0	0	4,010
<b>Total Travel and Expenses</b>	<b>54,990</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>54,990</b>
<b>6300 - SUPPLIES AND CONSUMABLES</b>						
6310 - Meals and Catering	11,075	0	0	0	0	11,075

**Santa Clara Valley Open Space Authority**

APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

**FY2020/2021 Budget -- Full Detail**  
**FINAL**

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6320 - Office Supplies	17,800	0	0	0	0	17,800
6330 - Kitchen Supplies	8,440	0	0	0	0	8,440
6340 - Outreach Supplies	15,000	0	0	0	0	15,000
6350 - Postage & Courier	4,600	0	0	0	0	4,600
6360 - Printing Expenses	21,000	0	5,000	0	0	26,000
6370 - Health & Safety Supplies	3,800	0	25,000	0	0	28,800
6380 - Uniforms and Apparel	6,000	0	11,000	0	0	17,000
6390 - Land Management	0	0	0	0	0	0
6391 - Fuel and Consumables	0	0	36,000	0	0	36,000
6392 - Waste & Hazmat Disposable	0	0	9,000	0	0	9,000
6393 - Fire Management	0	0	10,000	0	0	10,000
6394 - Vegetation Management	4,000	0	32,500	0	0	36,500
6395 - Roads and Trails	15,000	0	35,000	0	0	50,000
6396 - Wildlife Management & Pest Control	0	0	10,000	0	0	10,000
6397 - Signs and Fencing	0	0	75,000	0	0	75,000
6398 - Grazing	2,000	0	15,000	0	0	17,000
6399 - Miscellaneous	0	0	0	0	0	0
Total Supplies and Consumables	108,715	0	263,500	0	0	372,215
<b>6400 - OUTSIDE SERVICES/CONSULTANTS</b>						
6410 - Accounting and Finance Services						
6411 - Bookkeeping	0	0	0	0	0	0
6412 - Audit	10,500	0	2,000	0	0	12,500
6413 - Financial Advisory	18,500	0	0	0	0	18,500
6414 - Grant Preparation	0	0	0	0	0	0
6420 - Management and Organizational Services	0	0	0	0	0	0
6421 - Government Relations	82,000	0	0	0	0	82,000
6422 - Redistricting	0	0	0	0	0	0
6423 - Strategic Planning	50,000	25,000	0	0	0	75,000
6424 - Risk Management	0	0	0	0	0	0
6425 - Engineering Services	22,000	0	8,200	0	0	30,200
6430 - Legal	0	0	0	0	0	0
6431 - Legal Counsel - Redistricting	0	0	0	0	0	0
6432 - Legal Counsel - Special Counsel	0	0	0	0	0	0

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6433 - Legal Counsel - General	150,000	0	100,000	0	0	250,000
6434 - Legal Counsel - Litigation	0	100,000	0	0	0	100,000
6435 - Legal Counsel - Employment Law	0	0	0	0	0	0
6440 - Staff Development	0	0	0	0	0	0
6441 - Recruitment Services & Support	9,375	0	0	0	0	9,375
6442 - Workforce Optimization & Development	53,000	0	0	0	0	53,000
6444 - Policy Development & Support	0	0	0	0	0	0
6445 - Temp Services	12,000	0	0	0	0	12,000
6446 - HR Support Services	73,500	0	0	0	0	73,500
6450 - Computer and IT Services	0	0	0	0	0	0
6451 - IT Services	10,000	0	0	0	0	10,000
6452 - Website and Domain	20,520	0	20,000	0	0	40,520
6453 - ERP	16,000	0	0	0	0	16,000
6454 - Records Management	4,000	0	0	0	0	4,000
6455 - CRM	8,000	0	0	0	0	8,000
6456 - Minutes Transcription	0	0	0	0	0	0
6457 - Telecom and Phone Maintenance	3,000	0	0	0	0	3,000
6458 - Governance	0	0	0	0	0	0
6460 - Community Engagement Services	0	0	0	0	0	0
6461 - Design and Content Services	16,000	0	20,000	0	0	36,000
6462 - Media Services	55,000	0	10,000	0	0	65,000
6463 - Photography & Video	12,500	0	0	0	0	12,500
6464 - Community Relations	5,000	0	90,000	0	0	95,000
6465 - Transportation Services	0	0	38,000	0	0	38,000
6466 - Environmental Education Partnerships	0	0	8,000	0	0	8,000
6470 - Resource Management Services	0	0	0	0	0	0
6471 - Site Monitoring	26,071	0	0	0	0	26,071
6472 - Wildlife Management	0	0	11,000	0	0	11,000
6473 - Vegetation Management	17,940	0	5,000	0	320,000	342,940
6474 - Resource Assessment/Env Review	0	0	70,000	0	0	70,000
6475 - Public Access/Facilities Maintenance	30,000	0	110,000	0	0	140,000
6476 - Fire Management	0	0	25,000	0	0	25,000
6477 - IPM/Pest Control	0	0	5,000	0	0	5,000

**Santa Clara Valley Open Space Authority**

APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

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6478 - Agricultural Improvements	0	0	2,000	0	0	2,000
6479 - Grazing Programs	3,000	0	74,000	0	286,000	363,000
6480 - Planning Services	0	0	0	0	0	0
6481 - General/Other Planning Services	0	0	550,000	0	0	550,000
6482 - Conservation Planning	0	0	195,000	0	0	195,000
6483 - Mapping & GIS Services	10,000	0	25,000	0	0	35,000
6484 - Long-Range Planning	0	0	0	0	0	0
6485 - Environmental Planning/CEQA	0	0	31,500	0	110,000	141,500
6486 - Environmental - Site Assessments	0	0	80,000	0	0	80,000
6487 - Prime Design	0	15,000	70,000	0	330,000	415,000
6488 - Prime Engineering	0	0	0	0	0	0
6489 - Other Design/Engineering	0	0	15,000	0	0	15,000
6490 - Acquisition and CIP Services	0	0	0	0	0	0
6491 - Surveys & Investigations	0	0	25,000	0	0	25,000
6492 - Brokerage/Transactions	0	0	35,000	0	0	35,000
6493 - Appraisals	0	0	60,000	0	0	60,000
6494 - Project/Construction Mgmt/Consult	0	0	0	0	0	0
6495 - Site Clean-up/Remediation/Demo	0	0	0	0	0	0
6496 - Restoration/Habitat Enhancement	0	0	0	0	0	0
6497 - Testing & Inspection	0	0	0	0	0	0
6498 - Construction	0	0	1,450,000	0	100,000	1,550,000
6499 - Contingency	0	0	0	0	0	0
<b>Total Outside Services/Consultants</b>	<b>717,906</b>	<b>140,000</b>	<b>3,134,700</b>	<b>0</b>	<b>1,146,000</b>	<b>5,138,606</b>
<b>6500 - OTHER SERVICES AND EXPENSES</b>						
6510 - Risk Management						
6511 - Worker's Compensation	54,449	0	158,865	0	0	213,314
6512 - Insurance Claim Loss	5,000	0	0	0	0	5,000
6513 - Liability SLIP	17,000	0	0	0	0	17,000
6514 - Liability SPIP	32,000	0	0	0	0	32,000
6515 - Crime	1,815	0	0	0	0	1,815
6516 - Safety Program	0	0	0	0	0	0
6520 - Fees	0	0	0	0	0	0
6521 - Payroll and Accounting	12,900	0	0	0	0	12,900

**Santa Clara Valley Open Space Authority**

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**FINAL**

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6522 - Bank and County Wire	2,000	0	0	0	0	2,000
6523 - Special Assessments	10,000	0	0	0	0	10,000
6524 - Permit	750	0	105,000	0	160,000	265,750
6525 - Escrow	0	0	8,000	0	0	8,000
6526 - Other	6,000	0	0	0	0	6,000
6527 - Election Costs	815,000	0	0	0	0	815,000
6528 - Public Notices	400	0	500	0	0	900
6529 - 1% County Collectors Fee	43,735	0	80,833	0	0	124,568
6530 - Advertising and Promotion	20,000	0	15,000	0	0	35,000
6540 - Interp & Educational Program Expenses	2,500	0	7,500	0	0	10,000
6550 - Event Production Expenses	0	0	22,500	0	0	22,500
6560 - Volunteer Program Expenses	0	0	0	0	0	0
6563 - Miscellaneous	2,500	0	14,000	0	0	16,500
6564 - Land Stewards	0	0	7,200	0	0	7,200
6565 - Volunteer Recruitment	0	0	36,000	0	0	36,000
6566 - Trailmasters	0	0	5,000	0	0	5,000
6570 - Meetings and Conferences	19,247	0	0	0	0	19,247
6580 - Training and Seminars	21,340	0	0	0	0	21,340
6590 - Recruiting	0	0	0	0	0	0
6591 - Job Postings/Ads	5,300	0	0	0	0	5,300
6592 - Pre-employment Testing	630	0	0	0	0	630
6593 - Assessments	13,200	0	0	0	0	13,200
<b>Total Other Services and Expenses</b>	<b>1,085,766</b>	<b>0</b>	<b>460,398</b>	<b>0</b>	<b>160,000</b>	<b>1,706,164</b>
<b>6600 - EQUIPMENT AND MAINTENANCE</b>						
6610 - Shop Equipment	0	0	3,000	0	0	3,000
6620 - Field Equipment	6,000	0	7,500	0	0	13,500
6630 - Small Tools	0	0	4,000	0	0	4,000
6640 - Office Equipment	7,950	50,000	0	0	0	57,950
6650 - Computers	0	0	0	0	0	0
6651 - Equipment	25,400	0	120,000	0	0	145,400
6652 - Software (Boxed)	0	0	0	0	0	0
6653 - Software (Subscription)	124,704	0	65,000	0	0	189,704
6654 - Data Backup	3,900	0	0	0	0	3,900



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**FY2020/2021 Budget -- Full Detail**  
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6660 - Office Furniture	0	110,000	0	0	0	110,000
6670 - Vehicles	196,000	0	0	0	0	196,000
6680 - Fleet Maintenance	0	0	85,000	0	0	85,000
6690 - Equipment Maintenance	0	0	15,000	0	0	15,000
<b>Total Equipment and Maintenance</b>	<b>363,954</b>	<b>160,000</b>	<b>299,500</b>	<b>0</b>	<b>0</b>	<b>823,454</b>
<b>6700 - FACILITIES AND UTILITIES</b>						
6710 - Rent	0	0	0	0	0	0
6720 - Moving Expenses	0	0	0	0	0	0
6730 - Building Maintenance and Repair	30,037	17,000	20,500	0	0	67,537
6740 - Landscaping and Plantscaping	14,220	0	0	0	0	14,220
6750 - Janitorial Services	63,200	0	0	0	0	63,200
6760 - Alarm Services	2,124	0	0	0	0	2,124
6770 - Internet and Phone	27,770	0	0	0	0	27,770
6780 - Radio and Cellular	136,308	0	34,000	0	0	170,308
6790 - Utilities	0	0	0	0	0	0
6791 - Garbage	3,000	0	0	0	0	3,000
6792 - Water	10,000	0	0	0	0	10,000
6793 - Electricity & Gas	60,000	0	2,000	0	0	62,000
6794 - Sewer	1,215	0	0	0	0	1,215
<b>Total Facilities and Utilities</b>	<b>347,874</b>	<b>17,000</b>	<b>56,500</b>	<b>0</b>	<b>0</b>	<b>421,374</b>
<b>6800 - MEMBERSHIPS AND SPONSORSHIPS</b>						
6810 - Professional Sponsorships	38,650	0	0	0	0	38,650
6820 - Library (Books and other Media)	250	0	0	0	0	250
6830 - Memberships & Dues	35,684	0	0	0	0	35,684
6840 - Subscriptions	700	0	0	0	0	700
<b>Total Memberships and Library</b>	<b>75,284</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>75,284</b>
<b>6900 - FEE TITLE &amp; CONSERVATION EASEMENTS</b>						
6910 - Fee Title	685,000	0	3,815,000	0	1,000,000	5,500,000
6920 - Conservation Easements	0	0	500,000	0	0	500,000
<b>Total Fee Title and Conservation</b>	<b>685,000</b>	<b>0</b>	<b>4,315,000</b>	<b>0</b>	<b>1,000,000</b>	<b>6,000,000</b>

**Santa Clara Valley Open Space Authority**

APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

<b>FY2020/2021 Budget -- Full Detail</b> <b>FINAL</b>	APPROVED FY20/21 District One	APPROVED FY20/21 Reserve	APPROVED FY20/21 Measure Q	APPROVED FY20/21 UOS	APPROVED FY20/21 Grants	APPROVED FY20/21 Budget TOTAL
<b>6950 - OSA GRANT PROGRAMS</b>						
6951 - District 1 20% Funding	0	0	0	0	0	0
6952 - Measure Q Urban Open Space Grant	0	0	0	1,000,000	0	1,000,000
6953 - Measure Q Env Edu Grant	0	0	0	0	0	0
6954 - Measure Q Grant Allocation	0	0	500,000	0	0	500,000
<b>Total OSA Grant Programs</b>	<b>0</b>	<b>0</b>	<b>500,000</b>	<b>1,000,000</b>	<b>0</b>	<b>1,500,000</b>
<b>TOTAL EXPENSES</b>	<b>6,002,419</b>	<b>317,000</b>	<b>12,830,386</b>	<b>1,000,000</b>	<b>2,306,000</b>	<b>22,455,805</b>

**Santa Clara Valley Open Space Authority**

APPROVED Budget and Annual Work Plan for Fiscal Year 2020/2021

**Appendix D: FINAL 2020/2021 Salary Position Pay Plan**

Position	Range #	Hourly Salary Range					Monthly Salary Range		Annual Salary Range	
		Min	Step 2	Step 3	Step 4	Max	Min	Max	Min	Max
Educational Aide Office Assistant Open Space Aide	10	\$25.50	\$26.77	\$28.11	\$29.52	\$30.99	\$4,420	\$5,372	\$53,036	\$64,465
Administrative Assistant Natural Resources Technician I Open Space Technician I	15	\$28.80	\$30.24	\$31.75	\$33.34	\$35.00	\$4,992	\$6,067	\$59,898	\$72,807
Open Space Technician II	19	\$31.75	\$33.34	\$35.00	\$36.75	\$38.59	\$5,503	\$6,689	\$66,038	\$80,269
GIS Technician Planning Technician	21	\$33.34	\$35.00	\$36.75	\$38.59	\$40.52	\$5,778	\$7,024	\$69,340	\$84,283
Executive Assistant	22	\$34.17	\$35.88	\$37.67	\$39.56	\$41.53	\$5,923	\$7,199	\$71,073	\$86,390
Communications Coordinator Community Engagement Coordinator	23	\$35.00	\$36.75	\$38.59	\$40.52	\$42.55	\$6,067	\$7,375	\$72,807	\$88,497
Deputy Clerk of the Board Educational Programs Coordinator Equipment Mechanic Operator Staff Accountant	24	\$35.88	\$37.67	\$39.56	\$41.53	\$43.61	\$6,219	\$7,559	\$74,627	\$90,709
Lead Open Space Technician	25	\$36.75	\$38.59	\$40.52	\$42.55	\$44.67	\$6,371	\$7,743	\$76,447	\$92,922
Grants Coordinator IT Technician	26	\$37.67	\$39.56	\$41.53	\$43.61	\$45.79	\$6,530	\$7,937	\$78,358	\$95,245
Supervising Open Space Technician Volunteer Programs Administrator	28	\$39.56	\$41.53	\$43.61	\$45.79	\$48.08	\$6,856	\$8,334	\$82,276	\$100,007
Communications Specialist Legislative Specialist	29	\$40.52	\$42.55	\$44.67	\$46.91	\$49.25	\$7,024	\$8,537	\$84,283	\$102,446
Assistant Open Space Planner	31	\$42.55	\$44.67	\$46.91	\$49.25	\$51.72	\$7,375	\$8,964	\$88,497	\$107,569
Accounting/Finance Analyst Grants Administrator Office and HR Administrator	32	\$43.61	\$45.79	\$48.08	\$50.48	\$53.01	\$7,559	\$9,188	\$90,709	\$110,258
Conservation GIS Coordinator Real Property Specialist Resource Management Specialist	33	\$44.67	\$46.91	\$49.25	\$51.72	\$54.30	\$7,743	\$9,412	\$92,922	\$112,947
Associate Open Space Planner	35	\$46.91	\$49.25	\$51.72	\$54.30	\$57.02	\$8,131	\$9,883	\$97,568	\$118,594
Clerk of the Board	36	\$48.08	\$50.48	\$53.01	\$55.66	\$58.44	\$8,334	\$10,130	\$100,007	\$121,559
Senior Open Space Planner	39	\$51.72	\$54.30	\$57.02	\$59.87	\$62.86	\$8,964	\$10,896	\$107,569	\$130,750
Director of Administrative Operations External Affairs Manager Field Operations Manager Planning Manager Assistant General Manager	47	\$62.86	\$66.00	\$69.30	\$72.77	\$76.41	\$10,896	\$13,244	\$130,750	\$158,928
	54	\$74.59	\$78.32	\$82.23	\$86.35	\$90.66	\$12,929	\$15,715	\$155,144	\$188,578

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