



BUDGET & ANNUAL WORK PLAN

FISCAL YEAR 2019/2020

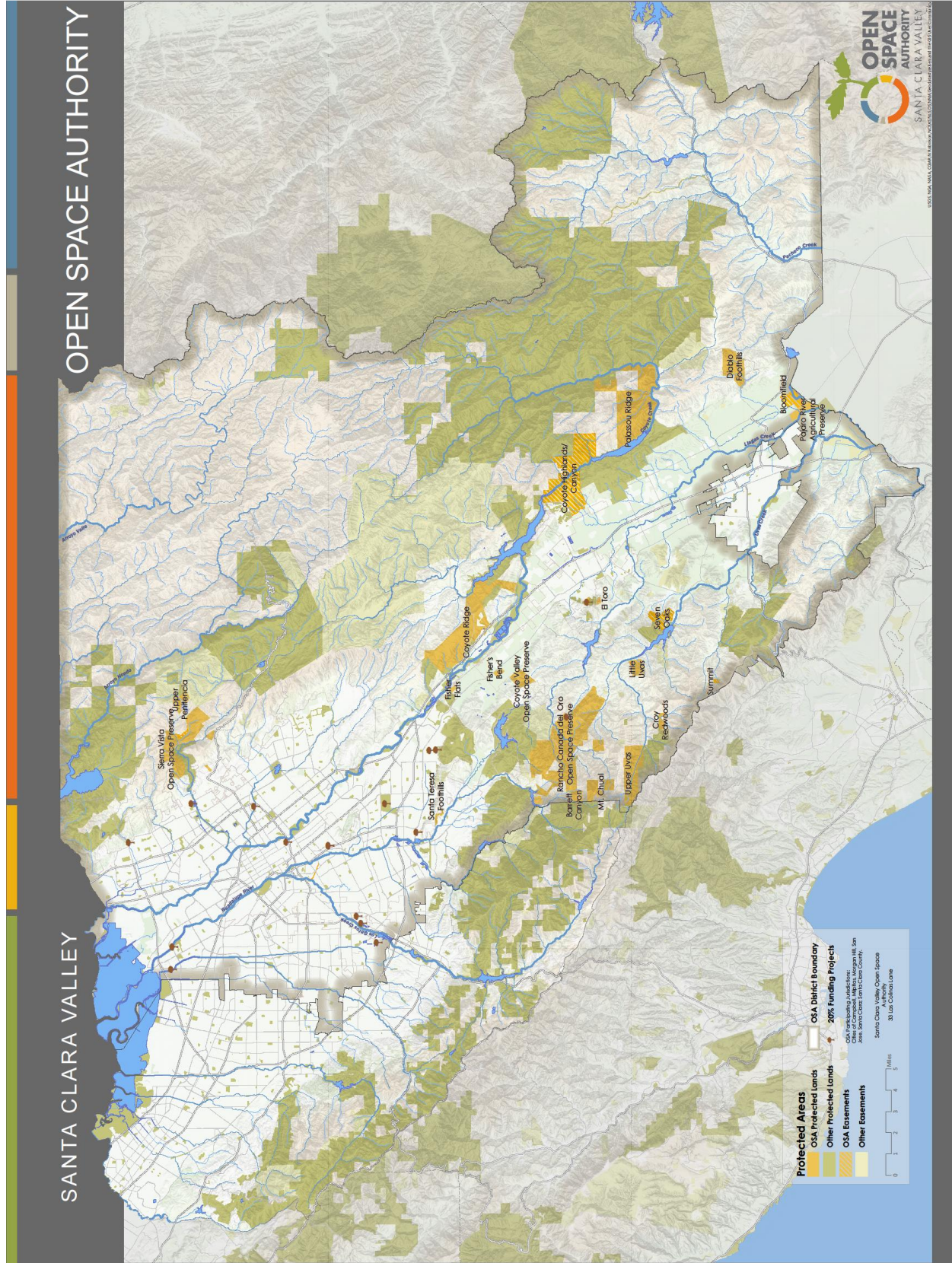
On the Cover:

A Conservation Priority –

Coyote Valley plays a critical role in the health and sustainability of our entire region, especially in the face of climate change. Strategic conservation investments in Coyote Valley can provide many valuable benefits to our urban communities by using nature as infrastructure to enhance or even replace traditional urban infrastructure like water treatment and flood prevention.

To the right:

2019 Jurisdiction Map highlighting the Authority's protected lands and easements



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Board of Directors



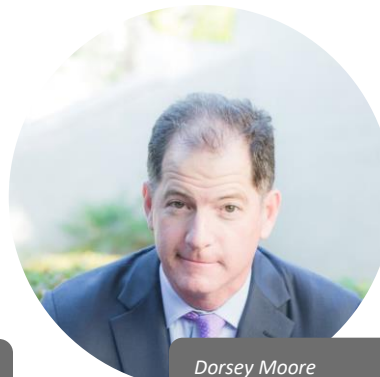
Alex Kennett
District 1



Mike Flaucher
District 2



Sequoia Hall
District 3



Dorsey Moore
District 4



Shay Franco-Clausen
District 5



Mike Potter
District 6



Dr. Calvin Gill
District 7

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Andrea Mackenzie
General Manager

General Manager's Message

I am pleased to present the Open Space Authority's FY 2019/2020 Budget and Annual Work Plan, which balances expenditures to the Authority's two revenue sources, District 1 Benefit Assessment and Measure Q Parcel Tax. The FY 2019/2020 Budget and Work Plan furthers the Authority's mission and strategically invests public funding to preserve and restore Santa Clara Valley's irreplaceable open spaces, wildlife habitat, natural resources and agricultural lands.

Preserving and restoring natural and working lands is one of the smartest investments we can proactively make in the face of a changing climate to ensure a sustainable, resilient region and livable future for all communities. By protecting open space from development, we ensure the significant environmental and community benefits that nature provides to our communities, including clean air and clean water, groundwater recharge, flood risk reduction, local food supply and carbon sequestration. And by connecting people to nature across Santa Clara County, we enhance public health, community wellness and quality of life.

Fiscal Year 2018/2019 Achievements

- The Authority celebrated its [25th Anniversary](#) and reached a milestone of 25,000 acres of open space preserved for the benefit of people and nature.
- The Authority awarded [21 grants](#) totaling \$938,512 to non-profit organizations, schools and public agencies in diverse communities to create parks, trails, community gardens and free environmental education programs that improve quality of life and connect people to nature close to home.
- The Authority partnered with the Midpeninsula Regional Open Space District, Peninsula Open Space Trust and Gordon and Betty Moore Foundation to [acquire 500 acres of open space](#) in the Santa Cruz Mountains, connecting Sierra Azul Regional Open Space and Rancho Cañada del Oro Open Space Preserve, protecting critical wildlife corridors and watershed lands and linking 31,000 acres of protected open space including important fuel breaks used by CalFire for responding to wildfires.
- The Santa Clara County Board of Supervisors adopted the [Santa Clara Valley Agricultural Plan](#), an innovative strategy jointly developed by the County and Authority to protect 12,000 acres of threatened Valley-floor farmland and adjacent rangeland, critical to the viability of local agriculture, protecting environmental values and reducing sprawl and associated greenhouse gas emissions.
- The [California Strategic Growth Council](#) awarded Santa Clara County and the Authority a \$100,000 grant from its *Sustainable Agricultural Land Conservation Program* (SALC) to develop a regional agricultural conservation easement (ACE) program to protect at-risk farmland as a

Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2019/2020

climate mitigation strategy and a \$15 million grant for protecting 250 acres of farmland in the San Martin area through agricultural conservation easements.

- Santa Clara County and the Authority received the *Governor's Environmental and Economic Leadership Award* (GEELA) in December 2018 for the Santa Clara Valley Agricultural Plan. GEELA is California's highest environmental honor and recognizes leadership in conserving California's precious resources, protecting and enhancing California's environment, building public-private partnerships, and strengthening the state's economy.
- The Authority informed development of the City of San Jose's [Measure T](#), a \$650 million infrastructure bond measure approved by voters on the November 2018 ballot, that includes up to \$50 million for [acquiring undeveloped land in Coyote Valley for the purposes of natural flood control and environmental quality](#).

Fiscal Year 2019/2020 Priorities

The General Manager's overarching priorities for the Authority's FY 2019/2020 Work Plan and Budget are to:

- Acquire high priority natural resource lands in the Coyote Valley to implement the Authority's Coyote Valley Landscape Linkage Report and the City of San Jose's Measure T Infrastructure Bond Measure
- Acquire agricultural conservation easements in Santa Clara Valley to implement the Santa Clara Valley Agricultural Plan
- Open an additional open space preserve and expand existing preserves and trail networks consistent with protection of natural resources
- Build awareness of nature as critical infrastructure through policy, communications, and outreach
- Increase participation of youth in volunteer events and environmental education programs
- Analyze opportunities to enhance the Authority's operational and financial sustainability

High-priority projects that implement these themes are listed in the attached Work Plan and include:

Real Property and Conservation Initiatives

- Partner with Peninsula Open Space Trust and the City of San Jose to acquire and permanently preserve up to 1,000 acres of open space in North Coyote Valley to implement the Coyote Valley Landscape Linkage and the City's Measure T infrastructure bond measure
- Partner with Santa Clara County Parks and Recreation Department, City of San Jose and Valley Transportation Authority to acquire the initial half mile of decommissioned railroad right of way to implement the Five Wounds Trail
- Partner with Santa Clara County to negotiate and acquire agricultural conservation easements on up to 250 acres in the San Martin area
- Partner with Santa Clara County, the Land Trust of Santa Clara Valley and State of California to initiate a Regional Agricultural Conservation Easement Program with a grant from the Sustainable Agricultural Land Conservation Program (SALC)
- Partner with the City of San Jose to quantify the climate benefits of natural and working lands to inform Climate Smart San Jose (Phase 2) and the General Plan update

Planning

- Plan, permit and design for Phase 1 public access improvements and initial construction at Coyote Ridge Open Space Preserve
- Provide public access to the Blair Ranch unit of the Rancho Canada del Oro Open Space Preserve
- Secure grant funding to initiate a Coyote Valley restoration planning process
- Partner with the Valley Habitat Agency to improve habitat and promote breeding of Western Burrowing Owls at Coyote Valley Open Space Preserve
- Develop a Wildland Fuels Management Policy to reduce wildfire risk and achieve natural resource goals across Authority lands
- Implement habitat enhancements for the California red-legged frog and California tiger salamander at Coyote Ridge, Rancho Canada del Oro and Coyote Valley
- Refine the grant guidelines for the Measure Q Urban Open Space and Environmental Education Grant Program and issue a call for projects

Public Affairs

- Publish a Report to the Community on the first 5 years' project expenditures for Measure Q
- Expand tracking and support of state and federal policy and legislation that may generate new sources of funding to implement the Authority's conservation programs and projects
- Develop a three-year strategic plan for Authority's website and digital communications

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Field Operations

- Increase opportunities for Authority management of other public agency resource lands
- Grow the capacity of the Authority's Volunteer Program by creating a "Master" class volunteer training corps for building and maintaining trails, invasive species management and building and maintaining fencing
- Expand reach of Environmental Education programming in school districts and provide transportation for students to Authority preserves

Administrative Operations

- Develop Work Plan Tracker for project management and reporting to assist Board of Directors
- Form Financial Sustainability Ad Hoc Committee to evaluate Authority's long-term financial position, analyze funding mechanisms and feasibility
- Develop strategic staffing plan for 2020-2025
- Develop a maintenance master plan for facilities management of the Authority's Headquarters

As the Authority looks to its next 25 years and beyond, the significant social, economic and environmental challenges facing our region will require greater cross-agency collaboration, more integrated responses and solutions, and more strategic investments benefitting nature and people.

In addressing these challenges and opportunities, the Authority will partner with local government and non-profit organizations to invest in protecting our remaining natural and working lands, and by working together and pooling limited funding sources, be able to increase the pace and scale of our open space protection efforts. We will also strengthen our ties with Valley leaders to shape informed public policy that recognizes natural and working lands as essential green infrastructure; that supports nature-based solutions to climate change; that builds more resilient communities and enhances quality of life. Finally, we will work with our sister agencies and organizations to increase opportunities to engage youth, especially in underserved communities, to help cultivate the next generation of conservation leaders and informed decision-makers.

The open space successes we have had and hope to continue to have are only possible because of the public's ongoing support of the Authority's mission. Thank you for your continued support of the Santa Clara Valley Open Space Authority.

Sincerely,



Andrea Mackenzie
General Manager

Mission and Vision of the Open Space Authority

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 or by calling the Authority offices at (408) 224-7476.

25 Years of Conserving the Santa Clara Valley



Pajaro River Agricultural Preserve

The Open Space Authority began in 1993 with a grassroots effort by citizen activists wanting to protect Santa Clara Valley’s important natural resources. We started as a small agency with an important role to play and have since grown into a diverse organization with greater capacity to make progress on our mission of conserving the natural environment, supporting agriculture, and connecting people to nature. Measure Q has provided further opportunity to fulfill our mission by enabling us to expand public access to nature in and around our urban communities, increase our environmental education programming, and help us maintain our open space preserves for public enjoyment.

To date, the Authority has protected over 25,000 acres of the Santa Clara Valley’s highest priority open space lands through purchase of fee title, conservation easements, and partnerships with other conservation agencies and non-profits. Each year, thousands of hikers, cyclists, and equestrians enjoy over 22 miles of well-maintained trails at the Authority’s Coyote Valley, Rancho Cañada del Oro, and Sierra Vista Open Space Preserves.

The Authority has long recognized the value of nature and access to parks, open space and trails to the quality of life in our urban communities. Through its 20% Funding Urban Open Space Program, the Authority has allocated nearly \$10 million of funding to city and county partnership projects to date. Since the inaugural launch of the Measure Q Urban Open Space Grant Program and the Measure Q Environmental Education Grant Program, the Authority has awarded over \$2.7 million in Urban Open Space grants to more than 38 diverse projects throughout the Authority’s jurisdiction.



San Francisco Bay Bird Observatory

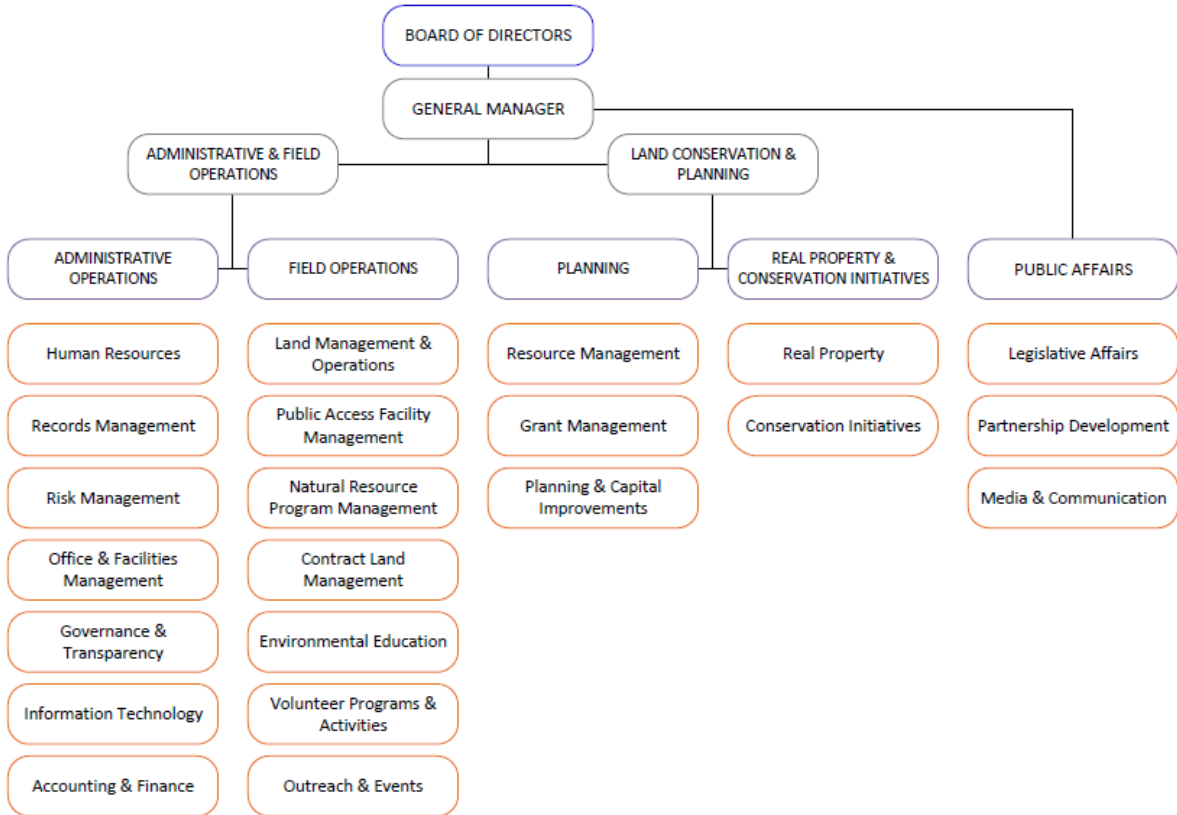


Restoration of Grassland Habitat

As we celebrated our 25-year milestone, we are looking to the next quarter century - and beyond. With significant growth projected to continue in Santa Clara County, and climate change threatening more extreme temperatures, droughts, and rainfall patterns, our work is more important than ever before. We will continue to focus on conservation and restoration, especially in Coyote Valley, in partnership with landowners, local and state agencies, public and private conservation partners, and local residents who share our commitment to open space in the Santa Clara Valley.

Staffing and Structure

The Open Space Authority has 38 Board-approved positions, including the Board-appointed General Manager, who implement the agency's mission through the following programs:



PART I: THE BUDGET



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Budget Development Process

The budget and work plan development process began in early January 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 12, 2019 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 2019/2020

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.



Sierra Vista Open Space Preserve

Santa Clara Valley Open Space Authority

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Fund Balance Carryover

By July 1, 2019, it is estimated that the Authority will carry over a cumulative total of \$45,232,022 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 \$45,232,022 in carryover funds, \$26,374,418 is available for withdrawal in the FY 2019/2020 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 (minus) 20% Funding Program	11,037,705 (2,457,705)	
Available Carryover Funds from District 1		8,580,000
Measure Q	12,696,469	
Available Carryover Funds from Measure Q		12,696,469
MQ Urban Open Space Grants (minus) Awarded UOS Grants	2,982,817 (2,314,899)	
Available Carryover Funds from UOS Grants		667,918
Reserve (minus) Operational Reserve (minus) Conservation Stewardship	17,115,136 (14,000,000) (85,000)	
Available Carryover Funds from Reserve		3,030,136
Grants	1,399,895	
Available Carryover Funds from Grants		1,399,895
TOTAL AVAILABLE CARRYOVER FUNDS FOR FY 2019/2020		26,374,418

Table 1

Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2019/2020

Fiscal Year 2019/2020 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 \$12,693,094. The Authority is expected to spend \$12,692,890 of the revenues received (Table 2).

Total expenditures for FY 2019/2020 are estimated to be \$19,661,838, of which \$12,692,890 is funded by incoming District 1 Assessment and Measure Q Parcel Tax revenues and the remaining \$6,968,948 is funded by grants, carryover and other income (Table 3).

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

Revenues and Expenditures	Estimated
FY 2019/2020 Estimated Authority REVENUES	12,693,094
FY 2019/2020 Estimated Authority EXPENDITURES	12,692,890

Table 2

Expenditure Breakdown by Funding Source	Estimated
District 1	4,542,374
Measure Q	8,150,516
<i>Authority-funded Expenditures</i>	<i>12,692,890</i>
Grants and Other Income	728,948
Measure Q Urban Open Space Grants Allocation	1,000,000
Capital Reserve Fund Carryover	240,000
Measure Q Fund Carryover	5,000,000
<i>Non-Revenue Expenditures</i>	<i>6,968,948</i>
TOTAL EXPENDITURES	19,661,838

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 Hillsides 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 \$85,000 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 2019/2020.



Sacred Heart Community Service: Mesa Verde Garden Education

Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2019/2020

FY 2019/2020 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 from the Capital Reserve and Measure Q Urban Open Space Grants Program 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 2019/2020, the Authority proposes to withdraw a total of \$5,907,918 (\$240,000 from Capital Reserve fund, \$5,000,000 from Measure Q fund, and \$667,918 from the Measure Q Urban Open Space Grant Program) from the available carryover balances.

Revenue/Income	FY19/20 District 1	FY19/20 Reserve	FY19/20 Measure Q	FY19/20 MQ UOS	FY19/20 Grants	FY19/20 TOTAL
5000 - REVENUES						
5100 - Revenue	4,347,417		8,035,104			12,382,521
Total Assessment Revenues	4,347,417		8,035,104			12,382,521
5700 - Land Management						
5701 - VTA	55,000					55,000
5702 - SCVWD	45,000					45,000
5703 - Waste Mgmt	0					0
5704 - Valley Habitat Agency	95,000					95,000
Total Land Mgmt Revenue	195,000					195,000
5601 - Ag Lease			115,573			115,573
Total Lease Revenue			115,573			115,573
TOTAL REVENUE	4,542,417		8,150,677			12,693,094
OTHER INCOME SOURCES						
Capital Reserve Fund Carryover		240,000				240,000
Measure Q Fund Carryover			5,000,000			5,000,000
Measure Q UOS Fund Carryover				667,918		667,918
MQUOS Allocation from MQ fund				700,000		700,000
5200 - Interest Income	70,000	200,000	150,000			420,000
5300 - Grants					728,948	728,948
5400 - Donations						
5500 - Land Sales						
5600 - Land Use Income						
5601 - Lease Income	16,800					16,800
5602 - Grazing Lease Income	18,000					18,000
5603 - Use Permit Income						
Total Other Income Sources	104,800	440,000	5,150,000	1,367,918	728,948	7,791,666
ALL REVENUE AND INCOME	4,647,217	440,000	13,300,677	1,367,918	728,948	20,484,760

Table 4

Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2019/2020

FY 2019/2020 Budget

The FY 2019/2020 Budget reflects the goals of the FY 2019/2020 Annual Work Plan. Total expenditures for FY 2019/2020 are estimated to be \$19,661,838, a 32% increase from FY 2018/2019.

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

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Budget At A Glance

Expenditures	FY19/20 District 1	FY19/20 Reserve	FY19/20 Measure Q	FY19/20 MQ UOS	FY19/20 Grants	FY19/20 Budget TOTAL	% of Budget TOTAL
6000 - PAYROLL							
Total Payroll	1,666,231		2,194,447			3,860,678	20%
6100 - BENEFITS & EMPLOYEE EXPENSES							
Total Benefits	702,128		889,920			1,592,048	8%
6200 - TRAVEL AND EXPENSES							
Total Travel and Expenses	42,100		3,000			45,100	0%
6300 - SUPPLIES AND CONSUMABLES							
Total Supplies and Consumables	99,475		185,000			284,475	1%
6400 - OUTSIDE SERVICES/CONSULTANTS							
Total Outside Services/Consultants	750,303	85,000	2,379,635		728,948	3,943,886	20%
6500 - OTHER SERVICES AND EXPENSES							
Total Other Services and Expenses	373,667		433,014			806,681	4%
6600 - EQUIPMENT AND MAINTENANCE							
Total Equipment and Maintenance	222,467		98,000			320,467	2%
6700 - FACILITIES AND UTILITIES							
Total Facilities and Utilities	248,228	155,000	21,500			424,728	2%
6800 - MEMBERSHIPS AND LIBRARY							
Total Memberships and Library	57,775		3,000			60,775	0%
6900 - FEE TITLE & CONSERVATION							
Total Fee Title and Conservation	240,000		6,243,000			6,483,000	33%
6950 – AUTHORITY GRANT PROGRAMS							
Total Authority Grant Programs	140,000		700,000	1,000,000		1,840,000	9%
TOTAL EXPENSES	4,542,375	240,000	13,150,515	1,000,000	728,948	19,661,838	100%

Table 5

Santa Clara Valley Open Space Authority

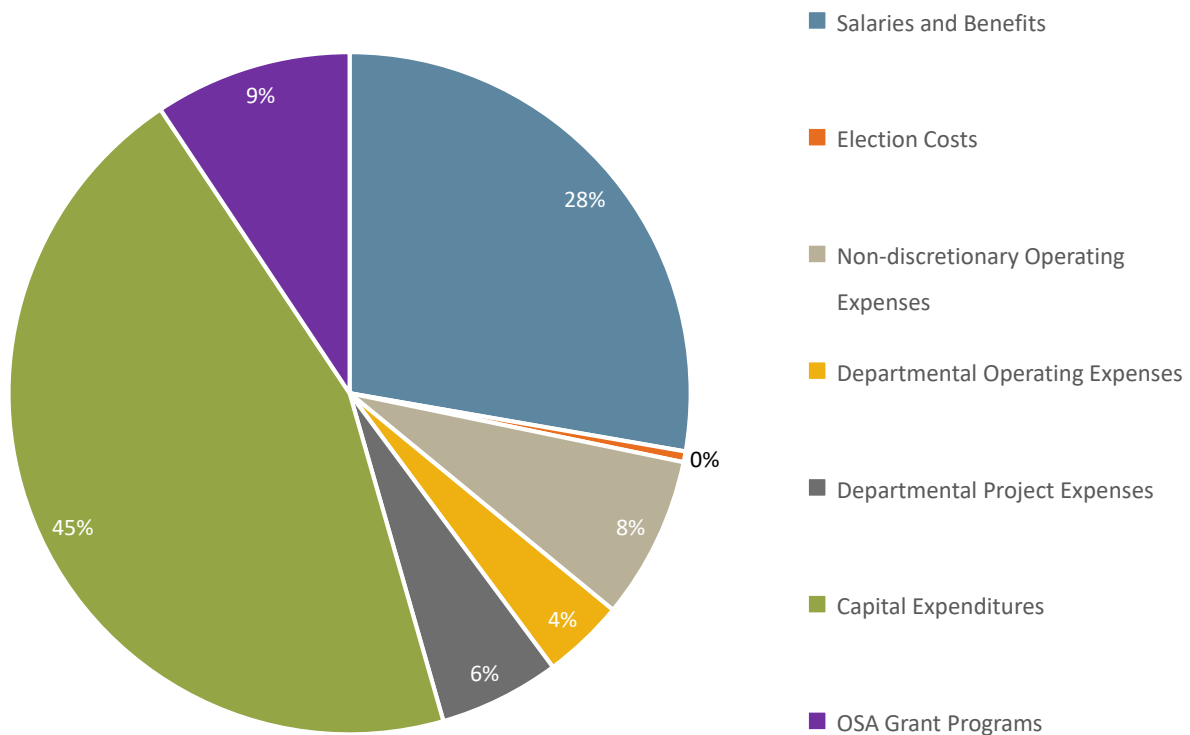
APPROVED Budget and Annual Work Plan for Fiscal Year 2019/2020

Expenditures by Department and Fund

Expenditures	FY19/20 District 1	FY19/20 Reserve	FY19/20 Measure Q	FY19/20 MQ UOS	FY19/20 Grants	FY19/20 Department TOTAL
Real Property & Conservation Initiatives	405,455	-	7,290,766	-	-	7,696,221
Planning	233,320	-	3,122,580	1,000,000	728,948	5,084,848
Public Affairs	680,926	-	417,030	-	-	1,097,956
Field Operations	670,544	-	1,538,847	-	-	2,209,391
Administrative Operations	2,524,172	240,000	781,292	-	-	3,545,464
Board	27,958	-	-	-	-	27,958
TOTAL EXPENDITURES BY FUND	4,542,375	240,000	13,150,515	1,000,000	728,948	19,661,838

Table 6

Expenditures by Type



Discussion of Expenditures

Staffing

The Authority currently has 38 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	
Real Property and Conservation Initiatives	Conservation GIS Coordinator, Real Property Specialist
Planning	Planning Manager, Senior Open Space Planner*, Grants Administrator, Resource Management Specialist, Planning Technician and Grants Coordinator
Public Affairs	External Affairs Manager, Communications Specialist, Community Engagement Coordinator and Legislative Specialist*
Field Operations	Field Operations Manager, Supervising Open Space Technician, Equipment Mechanic Operator, Lead Open Space Technician (2), Open Space Technician I (4), Open Space Aide (3), Volunteer Programs Administrator and Educational Programs Coordinator
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 2019/2020 Work Plan, increased staffing is recommended within the Field Operations and Planning Departments.

Field Operations will be augmented by the addition of two (2) part-time Educational Aides. These positions will have primary responsibility of supporting the Authority’s educational and volunteer programs, replacing previous seasonal positions with long term employment and allowing for individual growth in the field, reduced onboarding and training costs for the Authority, and consistency of staffing from season to season. The Field Operations department will add a second Supervising Open Space Technician position to provide supervisory direction to the Authority’s South County preserve team, relieving the Field Operations Manager of this day-to-day supervision. A new Natural Resources

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Technician position will serve as a bridge between the Field Operations department and the Planning department's Resource Management program, expanding the Authority's capacity to implement on-the-ground work in support of resource management projects.

The Planning department will expand capacity by the addition of a Planning Technician focused on the Authority's geographical information systems (GIS) program. This new position will provide GIS and cartography services to all departments of the Authority and ensure consistency of product and data management.

Approving these recommendations would increase the total number of regular positions at the Authority from 38 to 43.

The budget reflects the addition of three (3) full-time positions and two (2) part-time positions for FY 2019/2020.

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 2019/2020 the benefits package is approximately 41% of salary. Together, salaries and benefits are 28% 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 3.5% is recommended for FY 2019/2020.

Board and Committee Expenses

Board stipends, meeting expenses, and Board and committee member trainings are expected to be \$27,958 for FY 2019/2020.

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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	\$50,000
ZoomGrants	Grant management system	\$18,000
Office 365	Business software	\$14,052
Hubspot	CRM	\$12,000
PrimeGov	Legislative management system	\$8,400
Adobe	Business software	\$7,980
ArcGIS	Geographical information system	\$5,000
ArchiveSocial	Records Management	\$4,800
DropBox	Collaboration software	\$3,600
NinjaRMM	IT Remote Monitoring and Management	\$3,500
Amazon Web Services	Server backup software	\$3,000
Backblaze	PC backup software	\$2,400

Santa Clara Valley Open Space Authority

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Expenditure Details by Department

Summary of Department Expenses for FY 2019/2020						
Expenditure Type	Real Prop & Conservation Initiatives	Planning	Public Affairs	Field Ops	Admin Ops	TOTAL
Non-discretionary Operating Expenses						
Staff Costs -- Salaries and Benefits	571,121	1,032,213	602,756	1,575,127	1,671,509	5,452,726
Non-discretionary Expenses	5,000	18,000	16,800	455,934	1,021,450	1,517,184
Election Costs	-	-	-	-	100,000	100,000
Other Operating Expenses						
Departmental Operating Expenses	87,100	46,350	210,400	98,330	292,505	734,685
Departmental Project Expenses	205,000	488,285	268,000	-	165,000	1,126,285
Board	-	-	-	-	27,958	27,958
Total Operating Expenses	868,221	1,584,848	1,097,956	2,129,391	3,278,422	8,958,838
Capital Expenditures						
Land Acquisition	6,828,000	-	-	-	-	6,828,000
Capital/Structural Improvement	-	1,800,000	-	-	155,000	1,955,000
Capital Purchases	-	-	-	80,000	-	80,000
Total Capital Expenditures	6,828,000	1,800,000	-	80,000	155,000	8,863,000
Authority Urban Open Space Grant Programs						
District 1 20% Funding Program	-	-	-	-	140,000	140,000
MQ Urban Open Space Grant Allocation	-	700,000	-	-	-	700,000
MQ Urban Open Space Grant Awards	-	1,000,000	-	-	-	1,000,000
Total Authority Urban Open Space Grants	-	1,700,000	-	-	140,000	1,840,000
TOTAL ESTIMATED EXPENDITURES FOR 2019/2020	7,696,221	5,084,848	1,097,956	2,209,391	3,573,422	19,661,838

Table 8

Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2019/2020

Three Year Historical Budget Comparison

Budgeted Revenues and Income	Budgeted FY 2017/2018	Budgeted FY 2018/2019	Proposed FY 2019/2020
Revenues (District 1 and MQ)	12,458,258	12,713,669	12,693,094
Income (Reserve, Grants, MQ UOS)	2,572,000	2,649,200	7,791,666
TOTAL BUDGETED REVENUES AND INCOME	15,030,258	15,362,869	20,484,760

Budget	Budgeted FY 2017/2018	Budgeted FY 2018/2019	Proposed FY 2019/2020
Operating Budget			
Staff Costs – Salaries and Benefits	4,327,676	4,827,979	5,452,726
Administrative Operations	1,255,518	1,295,444	1,478,955
Field Operations	336,235	655,578	554,264
Public Affairs	489,291	409,296	495,200
Planning	471,255	837,565	552,635
Real Property and Conservation Initiatives			297,100
Board	29,884	25,271	27,958
Elections	200,000	400,000	100,000
Total Operating Budget	7,109,859	8,451,133	8,958,838
Capital Budget			
Land Acquisition	4,090,000	4,345,000	6,828,000
Capital/Structural Improvement	1,191,900	879,500	1,955,000
Capital Purchases	165,000	60,000	80,000
Total Capital Budget	5,446,900	5,284,500	8,863,000
Authority Grant Programs			
20% Funding	150,000	150,000	140,000
Urban Open Space Grant Allocation	500,000	500,000	700,000
Urban Open Space Grant Awards	1,000,000	500,000	1,000,000
Total Authority Grant Programs Budget	1,650,000	1,150,000	1,840,000
TOTAL BUDGET	14,206,759	14,885,633	19,661,838

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 2019/2020 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 2019/2020 Annual Work Plan

During the work plan development process for Fiscal Year 2019/2020, Authority staff consolidated department projects into agency projects and redesigned the overall presentation of the Annual Work Plan.

The changes seek: (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 now 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*.

RPC – Real Property and Conservation Initiatives department

PLN – Planning 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 2019/2020. The estimated project budget does not include staff time, or any expenditures paid for by a grant or partner.

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

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Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2019/2020

LAND PROTECTION AND CONSERVATION INITIATIVES

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

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 Project Budget
RPC	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 thirteen (13) properties totaling approximately 10,000 acres, with a roughly estimated market value of over 100 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.	1,683,000
RPC	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"> • Negotiate Cooperative Agreement and other related agreements with VTA, City of San Jose, and County Parks • Negotiate conservation easement to be jointly held by County Parks and Authority to protect their respective funding contributions • Seek grant funding to contribute towards acquisition of 0.4 +/- miles of railroad right-of-way from the Valley Transportation Authority 	0
RPC	San Martin Agricultural Conservation Easements	This project is funded in part by a \$15M Sustainable Agricultural Lands Conservation grant in partnership with Santa Clara County, with requirement to close by March 31, 2021 per grant agreement.	<ul style="list-style-type: none"> • Negotiate easement terms with owners of three agricultural properties totaling 252 acres • Draft conservation easements on the three properties • Obtain appraisals for the three properties • Complete due diligence on the three properties 	120,000

Santa Clara Valley Open Space Authority

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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, economic benefits

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 Project Budget
RPC	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"> • Work with County and Department of Conservation staff to develop new Farmland Mapping and Monitoring Program definition for farmland of local importance for County Board of Supervisors approval • Initiate Santa Clara Valley Regional Agricultural Conservation Easement (ACE) Program <ul style="list-style-type: none"> ○ Develop ACE prioritization criteria ○ Draft maps of priority areas ○ Solicit feedback from Technical Advisory Committee and partners • Coordinate with County and other stakeholders to evaluate funding options for agricultural conservation • Support partners in regional marketing and branding efforts 	25,000
RPC	Regional Conservation Investment Strategy	<p>On September 22, 2016, Governor Brown signed AB 2087 into law. This new law establishes a conservation planning tool called a Regional Conservation Investment Strategy (RCIS) to promote the conservation of species, habitats, and other natural resources and enable advance mitigation for public infrastructure projects.</p> <p>The Santa Clara Valley Open Space Authority sponsored development of an RCIS for Santa Clara County.</p>	<ul style="list-style-type: none"> • Submit the final RCIS to California Department of Fish and Wildlife for approval • Complete the Santa Clara County Subregional Assessment • Identify a potential pilot Mitigation Credit Agreement project 	25,000

Santa Clara Valley Open Space Authority

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Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 Project Budget
RPC	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"> • Develop initial resilience framework to frame design charrettes • Conduct design charrettes with experts to identify nature-based solutions for "place-types" in San Jose 	0
RPC	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"> • Review consultant proposals and develop final scope of work • Participate in development of methodology to model greenhouse gas emissions avoided by conserving greenfield sites within San Jose • Identify carbon sequestration opportunities and co-benefits associated with management of natural and working lands 	80,000

Santa Clara Valley Open Space Authority

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

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 Project Budget
RPC	High Speed Rail Planning	The scope of work includes coordinating with the High-Speed Rail Authority (HSRA) to share information about sensitive habitat areas (including wildlife corridors) that could be impacted by future HSRA or Caltrain facilities and to explore opportunities for regional advance mitigation funding associated with the project. Regional advance mitigation funding developed through negotiations with the High Speed Rail Authority may be used to secure high priority lands necessary for landscape connectivity, endangered species habitat, or farmland protection. This project also includes review and comment on the Project Environmental Impact Report, and extensive coordination with stakeholders to address and reduce impacts to regionally significant open space and farmland resources.	<ul style="list-style-type: none"> Engage HSR Authority and partners to develop appropriate project mitigations to ensure rail transportation projects maintain landscape connectivity and other environmental services in the Upper Pajaro and Coyote Valley Review and provide comment on draft Environmental Impact Report or associated project designs 	0
RPC	Coyote Valley Water Resources Investment Strategy	In partnership with the Santa Clara Valley Water District (SCVWD), the Authority is studying the Coyote Valley to understand the historic hydrology and ecological function to identify and evaluate potential water resource restoration and enhancement actions that can improve water resources and support large scale ecological restoration. The project includes modeling and analysis to evaluate the performance of different restoration and enhancement scenarios, as well as to help identify the most critical areas and water resource enhancement actions within Coyote Valley that can also support objectives related to flood protection, water supply, water quality, and habitat enhancement. This work will inform the Authority's land acquisition and restoration strategies and projects that are included in SCVWD's One Water Master Plan for Coyote Creek Watershed.	<ul style="list-style-type: none"> Finalize and publish technical report summarizing analysis of restoration scenarios and modeling results Work with Water District to integrate results into their One Water Master Plan for Coyote Creek Watershed and related flood planning efforts Integrate results into the Authority's land acquisition and restoration strategy for Coyote Valley 	5,000

Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2019/2020

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 Project Budget
PLN	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"> • Develop plan framework including team organization • Prepare outline and workflow of planning process • Initiate existing conditions inventory and analysis • Create public and stakeholder database • Initiate draft stakeholder outreach plan • Begin seeking funding through grant applications <p>*Based on timing and terms of site control</p>	200,000

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VISITOR USE, FACILITIES, AND CAPITAL IMPROVEMENTS

Create and implement strategic use and management plans for agency properties

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 Project Budget
PLN	Valley Green 2040	An Authority-wide Master Vision Plan with a 20-year planning horizon. The Plan will engage the public and stakeholders in a planning process to include strategies and implementation actions for land conservation and acquisition targets, preserve use and protection areas, natural and cultural resource management and preserve operations and management.	<ul style="list-style-type: none"> • Develop plan outline • Create public and stakeholder database • Develop draft outreach plan • Identify key data gaps across preserves and begin critical inventories 	150,000
PLN	Palassou Ridge Open Space Preserve Access Feasibility Plan	Develop an interim, short-term strategy and implementation schedule for limited public access at this preserve and improve operational access.	<ul style="list-style-type: none"> • Review Dexter Canyon crossing options for operational access and initiate inventories/analyses needed • Develop draft alternatives for short-term public access including use programming, design requirements, environmental compliance and budget needs. 	40,000

Santa Clara Valley Open Space Authority

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Plan and implement new visitor facilities and new ecological restoration projects on Authority properties

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 Project Budget
RPC	Coyote Valley South Valley Meadow Revegetation	Work to restore water supply to meadow and develop multi-year plan for completing volunteer and staff installation of restoration plantings at the South Valley Meadow restoration project area.	<ul style="list-style-type: none"> • Work with Santa Clara Valley Water District (SCVWD) to ensure water supply is restored via cross-valley pipeline retrofit • Monitor and document existing drill seeding work for success • Develop refined meadow planting list and schedule for future planting events that can include members of the public 	5,000
PLN	Coyote Valley Burrowing Owl Habitat Enhancement	Partner with Valley Habitat Agency to implement a pilot project for habitat improvements to help prevent extirpation and promote breeding of Western burrowing owls in Santa Clara County at the North Meadow area of the Coyote Valley Open Space Preserve	<ul style="list-style-type: none"> • Develop and implement vegetation management plan to manage the site vegetation to enhance habitat for burrowing owls 	0
PLN	Blair Ranch Pond Habitat Enhancement (RC-07 & RC-10)	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"> • Complete feasibility studies for Ponds RC-07 and RC-10 • Complete 50% engineering designs based on results of feasibility studies • Begin permitting process • Scope environmental review process 	90,000
PLN	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"> • Begin development of an interim restoration plan • Seek and apply for grant funding • Determine permits and environmental compliance needed 	0

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Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 Project Budget
PLN	Coyote Ridge Open Space Preserve Grazing and Habitat Improvements	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.	<ul style="list-style-type: none"> • Replace 1-mile of fencing with 3.2 miles of wildlife friendly fence that match the southern property border • Scope spring enhancements • Scope additional fence and habitat improvement projects 	0
PLN	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"> • Participate in planning process for development of POST’s interim management and enhancement plan • Contribute to cost sharing for field implementation of some plan recommendations 	20,000
PLN	Coyote Ridge Pond Restoration	The Authority and the Valley Habitat Agency are partnering to restore two ponds on Coyote Ridge Open Space Preserve. In both ponds there were headcuts through the earthen berm preventing ponding conditions. The project is intended to restore pond function and enhance habitat for California red-legged frogs and other aquatic species by repairing the earthen berms, improving the overflow spillways, and enlarging and deepening the two ponds to increase ponding duration.	<ul style="list-style-type: none"> • Obtain final permits for two ponds at CROSP • Complete construction for two ponds at CROSP 	0

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Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 Project Budget
PLN	Rancho Cañada del Oro Public Access	Development of a plan to provide public access to the Blair Ranch area within the Rancho Cañada del Oro Open Space Preserve via a pedestrian bridge crossing over Llagas Creek. Construction estimated to complete for public use in 2021.	<ul style="list-style-type: none"> • Confirm permits needed and begin applications • Determine necessary CEQA compliance and initiate inventories/studies needed • Continue design process based on potential impacts and permit requirements • Initiate construction documents and associated RFP if permitting timeline allows • Seek grant opportunities for construction costs 	350,000
PLN	Coyote Valley Open Space Preserve Improved North Meadow Public Access	Improve equestrian parking area and provide an accessible trail and overlook to the North Meadow area of Coyote Valley Open Space Preserve. Include an interpretive station to view experimental Western Burrowing Owl Habitat enhancement as well as future hydrological restoration of the watershed lands and a branch of Fisher Creek in the meadow. Construction estimated to complete for public use in 2022.	<ul style="list-style-type: none"> • Confirm permits needed and begin applications • Determine necessary CEQA compliance and initiate inventories/studies needed in tandem with Western Burrowing Owl Habitat Enhancement Project • Initiate design process based on potential impacts and permit requirements • Seek and confirm grant opportunities for construction costs • Initiate construction documents and associated RFP if permitting timeline allows 	250,000
PLN	Coyote Ridge Open Space Preserve Public Access	Planning, permitting, environmental compliance and design for public access improvements and construction 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. Construction estimated to be complete for public use in 2021.	<ul style="list-style-type: none"> • Secure Valley Habitat Agency permit • Initiate and finalize environmental compliance documents • Initiate and complete design documents including RFP for construction if permitting and compliance timeline allows • Prepare grant application(s) to secure funding for construction • Begin construction based on securing permits and completion of environmental compliance, construction documents, RFP and contracting 	300,000

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Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 Project Budget
PLN	Sierra Vista Open Space Preserve Backcountry Campground	In partnership with the Bay Area Ridge Trail Council and through funding from their donor, a small-scale backcountry (hike-in only) campground will be established for an urban wilderness experience at Sierra Vista Open Space Preserve. Construction estimated to be complete for public use in 2022.	<ul style="list-style-type: none">• Begin feasibility study for a pilot project• Confirm site location and permits required• Initiate design alternatives• Begin stakeholder outreach	0

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Maintain and repair existing agency facilities and assets

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 Project Budget
ADM	33 Las Colinas Facilities Maintenance and Improvements	Maintain the integrity and ensure the life span 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"> • Identify potential repair, replacement and maintenance needs and develop a master plan with budget requirements <ul style="list-style-type: none"> ○ Engage vendor to assess building condition and possible needed repairs ○ Document existing knowledge of building maintenance and repair requirements ○ Draft 33LC Facilities Master Plan ○ Establish budget for 33LC Facilities Master Plan for implementation in fiscal year 2020/2021 • Resurface roof deck for water tightness and usability of space, while maintaining ADA compliance <ul style="list-style-type: none"> ○ Draft and post RFP ○ Select and engage vendor ○ Resurface roof deck • Replace three (3) HVAC units, all of which are estimated to be at end-of-life <ul style="list-style-type: none"> ○ Draft and post RFP ○ Select and engage vendor ○ Place order for HVAC units ○ Install HVAC units • Research feasibility of implementing electric car chargers for fleet and public use, purchase and install chargers if research warrants <ul style="list-style-type: none"> ○ Research legal requirements of and available funding for electric car chargers ○ Assess use of facilities space and impact on operations ○ Determine if installing electric car chargers is practicable ○ Draft and post RFP; Select and engage vendor ○ Install chargers 	155,000

NATURAL AND CULTURAL RESOURCES MANAGEMENT

Develop resource policies and programs and monitoring plans

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 Project Budget
PLN	Grazing Monitoring Program	Oversee annual Residual Dry Matter (RDM) monitoring across lands the Authority manages that use conservation grazing as a natural resource management tool. Partner with Point Blue Conservation Science’s Rangeland Monitoring Program to measure key indicators of rangeland health (soil, vegetation, and bird species) on Authority lands. Explore alternative grazing monitoring methods and stay up to date with the latest science.	<ul style="list-style-type: none"> • Complete monitoring through the Rangeland Monitoring Network at Sierra Vista Open Space Authority in partnership with Point Blue Conservation Science • Start monitoring through the Rangeland Monitoring Network at Diablo Foothills Open Space Preserve in partnership with Point Blue Conservation Science • Conduct RDM monitoring on Authority-managed properties where grazing occurs 	13,000
PLN	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"> • Scope goals and objectives for wildlands fuel management policy and plan • Develop outline of draft wildlands fuel management policy and plan • Identify and scope environmental review process for wildlands fuel management policy and plan 	40,000
PLN	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"> • Finalize draft IPM Policy and Plan • Prepare draft and final environmental document for IPM Policy and plan • Seek Board approval and adoption of IPM Policy and Plan 	50,000
PLN	Loma Fire Vegetation Monitoring	A three-year habitat study on Authority lands burned by the 2016 Loma Fire. Monitoring efforts will assist with understanding habitat adaptation to climate events, inventory colonization of plant species following such incidents, and inform wildfire recovery across Authority preserves	<ul style="list-style-type: none"> • Complete the three-year post-fire vegetation monitoring project and complete draft and final report of results 	18,000

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Prepare and implement plans to protect, restore and enhance natural habitats

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 Project Budget
PLN	Coyote Valley Reptile and Amphibian Study	Implement California Department of Fish and Wildlife Local Assistance Grant (LAG)-funded project for determining the existing distribution and habitats of three important focal species in and around Coyote Valley (California red-legged frog, California tiger salamander, and the Western pond turtle) and determine if and how connectivity across Coyote Valley exists or can be restored.	<ul style="list-style-type: none"> • Identify baseline conditions of species' occurrences and habitats • Identify baseline conditions of landscape linkages • Identify measures to improve populations and landscape connectivity • Hold a stakeholder meeting • Complete draft and final report with study results 	0
PLN	Pond Invasive Species Management Study	Identify methods and develop a plan to remove pest species that threaten endangered species in ponds at Rancho Cañada del Oro Open Space Preserve	<ul style="list-style-type: none"> • Survey target ponds • Determine permits and environmental measures needed to remove pests while also protecting listed species 	20,000
PLN	Pajaro River Basin Wildlife Study	Cost-sharing with POST for wildlife inventory and study in the Pajaro River basin to help inform work at the Authority's Pajaro River Agricultural Preserve	<ul style="list-style-type: none"> • Implement second year of study 	3,000

COMMUNITY ENGAGEMENT AND INVESTMENT IN URBAN COMMUNITIES

Invest in urban greening and open spaces to benefit the environment and local communities

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 Project Budget
PLN	Measure Q Urban Open Space Grant Program Solicitation	The Urban Open Space Grant Program and Environmental Education Grant Program are competitive grant programs funded by Measure Q to benefit communities and neighborhoods within the Authority's jurisdiction.	<ul style="list-style-type: none"> Work with CAC and Board to update the Measure Q Guidelines Determine future grants management software needs Evaluate existing grants management software to determine continued usability Prepare the next Measure Q grant solicitation and review of applications 	1,000,000
PUB	Understanding Our Community	The initial report, completed and presented to the Board of Directors in 2015, mapped various demographic and environmental burdens and barriers that might exist for certain populations within the Authority's jurisdiction in accessing nature and open space. Phase II of this report adds additional data layers that go beyond the barriers studied in the first report, to focus more on needs for access to nature and open space in urban areas. These additional geographically represented data layers include park and trail accessibility (provided by the Trust for Public Land), health indicators, such as childhood obesity rates and heart disease rates (provided by Santa Clara County Health Dept.), access to healthy foods (provided by the Health Trust), and anecdotal reports of cultural needs for open space in urban areas (facilitated by New America Media). The intent is to compile this data into an updated report, and in the following year, make all the data available to the general public through interactive web-based maps, so that the public at large, and especially Urban Open Space Grant Program applicants, can define their projects to have the maximum beneficial impacts on the communities where the need is greatest. The data will also be used by the Authority to inform location and content of Environmental Education programming.	<ul style="list-style-type: none"> Completion of the second phase of Understanding our Community assessment by including needs-based data from Trust for Public Land, County Health, Health Trust, New America Media and others Printing and launch of report 	20,000

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Engage the public, with an emphasis on diversity and youth, through volunteer, outreach, and environmental education programs

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 Project Budget
FLD	Volunteer Outreach and Stewardship	<p>Volunteer programs, especially those that engage participants in projects on Authority preserve lands, build a deeper understanding of the region’s natural systems, build strong relationships between the Authority and the communities where the projects occur, and build a sense of ownership of the resource improvements by the participants who contributed to those improvements. The Monthly Land Stewards Program is designed to augment Authority Field staff capacity by providing intensive work project assistance for priority projects, saving the Authority significant labor costs by achieving work results without hiring additional staff.</p> <p>The objective is to develop the program to provide for consistent, robust volunteer attendance, at monthly land steward activities, providing increased opportunities for people to interact with their natural environment.</p>	<ul style="list-style-type: none"> • Develop a pilot program that tethers Community Outreach events with additional Authority events that take place at or near Authority-funded sites • Increase youth participation 	0
PUB	Deep Engagement Communities Partnership and Community Building Plan	<p>Develop detailed DEC Partnership Plan (document) that will describe how agency resources can best be focused on community building through multi-lingual, ethnic, ethnic media, networking, and outreach that helps us learn more about and how to serve those living in DECs.</p>	<ul style="list-style-type: none"> • Deliver cultural relevancy training to key Authority staff and/or stakeholders • Identify key new partners per priority audience segments, agency objectives • Develop targeted messaging, including interviews and testimonials • Research possibility of specific collateral materials 	10,000
FLD	Transportation to Authority Preserves Pilot Program	<p>Programming will take place at approximately four (4) schools followed by transportation and educational programming at an Authority Preserve. In conjunction with both educational programming, information for parents to learn about the Authority and understand what their child is learning will be sent home during each learning activity</p>	<ul style="list-style-type: none"> • Develop two-step Pilot program to bring Environmental Education to a local school district within Authority’s jurisdiction 	\$25,000

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Build public awareness of the importance of nature and open space for the community and region

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 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"> • Draft strategic plan • Restructure the website to incorporate new messaging • Launch the initiative with possible media push, grassroots outreach, etc. 	25,000
PUB	Nature as Infrastructure Initiative	Create and implement strategy for content, collateral, social media, and other communication methods to support the Authority's Nature as Infrastructure Initiative, continuing and building on the Coyote Valley Communications Strategy, with particular focus on applying these principles to Coyote Valley as an example, though expanding the principles to all of our natural resource and working land protection activities.	<ul style="list-style-type: none"> • Develop strategic messaging and awareness building, especially to new audiences • Public education surrounding natural infrastructure, utilizing Coyote Valley as a case study • Create any new materials needed 	50,000
PUB	Agency Branding Standards	Establish standards for communication materials to present a consistent brand for the Authority	<ul style="list-style-type: none"> • Create agency standards for use by staff, board, CAC and update agency collateral, maps, and other communication materials according to these standards. • Create a writing style guide, ppt templates, map consistency, social media use by non-comms staff, board and CAC. • Create and execute training for the standards to staff, Board, CAC. 	5,000
PUB	Measure Q 5-Year Anniversary Report	Build public awareness of projects and initiatives funded by Measure Q with the publication of a 5-year anniversary report, highlighting “promises made, promises kept” to the community	<ul style="list-style-type: none"> • Identify major accomplishments of Measure Q over the past 5 years and craft a report to tell these stories to the community • Begin the design, content, and layout of the report (digital and print) 	38,000

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AUTHORITY ORGANIZATIONAL SUSTAINABILITY

Develop and implement long-range funding and investment strategies

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 Project Budget
ADM	Financial Consultant for Investments	Hire an outside financial consultant to provide guidance on Authority investments and funds	<ul style="list-style-type: none"> • Assess needs and desired outcomes for agency • Draft and post RFP • Select and engage consultant • Produce a plan to invest the agency’s available cash • Implement plan 	25,000
ADM	Long-term Funding Mechanisms	Develop a strategic funding plan that includes 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"> • Form an ad hoc committee • Determine funding needs and timing • Investigate possible funding mechanisms, engaging a consultant if needed • Conduct polling to determine feasibility • Develop a plan to implement strategy 	55,000

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Develop and implement strategic staffing and retention strategies

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 Project Budget
ADM	Strategic Staffing Plan	Develop a five-year strategic staffing plan that addresses the agency's priorities	<ul style="list-style-type: none"> • Determine the agency's top operational priorities for the next five years • Determine gaps between existing staffing and skill sets and those needed over the next five years • Develop a strategic plan for implementation in fiscal year 2020/2021 to close the gaps between needed and existing staffing and skill sets over the next five years 	0
ADM	Intentional Culture	Develop an intentional culture in alignment with the Culture Survey results	<ul style="list-style-type: none"> • Develop a mechanism to regularly gather feedback from staff regarding current culture and employee engagement • Implement mechanism • Share feedback with Executive and Leadership teams, as appropriate, and implement changes that will keep culture aligned with survey results 	0

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Increase agency operating efficiencies and efficacies

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 Project Budget
ADM	Acumatica Reports	Provide staff with pre-written Acumatica reports that will satisfy the most common financial reporting needs	<ul style="list-style-type: none"> • Determine top three most requested financial reports • Create and initiate a scope of work with Acumatica • Test reports • Document contents of reports, what data represents and how to use reports • Make reports available to staff with training 	10,000
ADM	IT Master Plan	Create an IT Master Plan to use as a framework for future IT-related procurement	<ul style="list-style-type: none"> • Conduct an audit of existing hardware and software • Create an outline of the IT Master Plan • Identify missing IT-related how-to documentation • Draft and post an RFP for a consultant to conduct a network security audit and provide best practices guidelines 	0
ADM	Contract Management	Centralize and simplify contract management, including the use of electronic signatures, to streamline the overall contracting process	<ul style="list-style-type: none"> • Determine opportunities for improvement by polling agency stakeholders • Research available systems for electronic signatures along with their system requirements and costs • Develop a proposal to streamline the contract process that includes centralizing contract management in Administrative Operations • Get approval for and implement plan 	0

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Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 Project Budget
ADM	Staff Roles and Expectations	Define and document staff roles and expectations, along with operating norms and decision-making responsibilities to improve organizational effectiveness	<ul style="list-style-type: none"> • Define the role of each position within the agency by identifying the top few functions the position is responsible for and the topics for which they are considered subject matter experts • Share the role documentation with all staff • Define operational and behavioral expectations for all staff members and those with leadership roles • Share the expectations documentation with all staff • Document and roll-out operating norms in collaboration with the staff Operating Norms committee • Create a decision-making chart, such as RASCI, for the agency • Share the decision-making chart with all staff 	0
ADM	Human Resources Processes	Assess current HR processes for opportunities to streamline and/or implement technology-based solutions	<ul style="list-style-type: none"> • Conduct a needs assessment to identify processes where technology could replace manual work currently being used to capture, organize and manage data • Research technology-based solutions, including available Human Resources Information Systems (HRIS), system requirements and costs • Draft and submit a prioritized proposal to streamline current manual HR processes using technology or other means 	0
ADM	Integrate Administrative and Field Operations	Integrate Administrative and Field Operations departments into one division to support streamlined operations, shared division purpose and role clarity	<ul style="list-style-type: none"> • Implement quarterly division meetings to impart shared information, build a sense of team and foster collaboration • Implement regular check ins with the Field Operations leaders • Assess opportunities to streamline joint operations and share proposal for efficiencies • Implement revised processes 	0

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Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 Project Budget
RPC	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"> • Implement central data portal to enhance the ability of Authority’s GIS to support various agency-wide programs and projects • Update key data sets and develop applications for consistent GIS data collection and management in support of real time use by all staff. 	40,000
PUB	Website and Digital Media Capacity-Building Plan	<p>Develop and implement three-year strategic plan for website and any digital media considerations that would accommodate growing needs of all Authority departments for communication to public of new initiatives, reports, and other major work products</p>	<ul style="list-style-type: none"> • Identify short-term and long-term priorities for website update implementation • Implement 2-4 website updates based on priority and completion of projects/initiatives 	40,000

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Ensure good governance and transparency practices

Department Lead	Project Name	Project Description	Fiscal Year Scope of Work	Proposed FY19/20 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"> • Plan and facilitate required training for Board of Directors • Compile and submit financial documents and other required documentation for CSDA review • Post recognition when achieved and share with insurance carrier 	1,291
ADM	Work Plan Status Updates	Develop and implement a mechanism to provide regular work plan status updates, beginning with the FY 2019/2020 work plan, to key stakeholders, including staff, the Board and the public	<ul style="list-style-type: none"> • Revise work plan format to facilitate project updates • Develop a dashboard that shares key status information and is simple to understand and maintain • Implement dashboard by the end of Q1 FY 2019/2020 	0

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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.



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Real Property and Conservation Initiatives

The Real Property and Conservation Initiatives (RPC) 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.

RPC programs include:

- Real Property
- Conservation Initiatives

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/or significant climate resilience benefits.

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

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- 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;
- 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.

In FY 2019/2020, the Conservation Initiatives Program will continue 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.

Planning

The Planning Department is responsible for planning and implementation of resource management projects; grantmaking and grant-seeking; developing use and management plans for Authority properties; and planning, design, and construction of capital improvement projects for visitor facilities and ecological restoration.

Programs within the Planning Department include:

- Resource Management
- Grant Management
- Planning and Capital Improvements

Resource Management

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

- 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

Grant Management

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

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- Oversight of the Authority's District 1 Assessment's 20% Funding Program;
- Outreach and reporting on the Authority's grant programs;
- Oversight of the Authority's Measure Q Urban Open Space Grant Program which includes guideline development, solicitations and awards, contracting and project tracking;
- Overall management of grant-seeking efforts including tracking opportunities and developing materials, as well as supporting grant application development;
- Management of incoming grants that leverage the financial resources of the agency.

The administration of the Measure Q Urban Open Space Programs includes overseeing grant agreements, processing disbursements, and maintaining the grants-tracking system. As of March 31, 2019, the Authority expects to expend staff time supporting over two dozen current grantees shown in Table 10, as well as supporting the next grant cycle scheduled to award \$1,000,000 to local organizations and non-profits.

Current Grantees as of March 31, 2019

Latinos United for a New America (LUNA)
Joseph George Middle School / Citizen Schools
San Jose State University Research Foundation
City of Campbell
Santa Clara County Public Health Department
Bay Area Ridge Trail Council [2 grants]
The Regents of the University of California / UCCE SCC
The Santa Clara County Food System Alliance
Keep Coyote Creek Beautiful [2 grants]
City of Morgan Hill
Friends of Master Gardeners of Santa Clara County
Bay Area Wilderness Training [2 grants]
City of Morgan Hill
City of San Jose
City of Santa Clara
Guadalupe River Park Conservancy [2 grants]
Living Classroom [2 grants]
Our City Forest
Sacred Heart Community Service [2 grants]
Valley Verde
Veggielution [2 grants]
Bay Area Older Adults
San Francisco Bay Wildlife Society
San Jose Children's Discovery Museum

Table 10

These Measure Q-funded grants considerably 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. 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.

Capital Improvements

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

- Mid and long-range strategic master planning, use and management of Authority-owned preserves;
- Local and regional public access policy and planning;
- Development of capital improvement plans to inform future funding needs;
- Planning, design and construction of public access facilities including trails, staging areas, signage, interpretive features and other public access-related facilities;
- Develop stakeholder and public outreach strategies and plans as part of project implementation;
- Ecological restoration capital project planning, design and construction; and
- Authority-wide 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 on regional implementation of planning initiatives, and
- Working with the public affairs team 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 periodic publications, annual report, trail maps and other brochures, web site, social media, and press relations, partnership development, legislative, policy, and public funding support, and building of relationships with our 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 estimated to be about 200,000 visitors per year, increased visitation has led to additional maintenance requirements for all the Authority's public access facilities.

Natural Resource Management

The Natural Resource Management Program is responsible for enhancing natural resources within Authority lands in conjunction with the Planning Department. Tasks include site restoration, site monitoring for biological processes, invasive species management, wildlife observations and studies, and site rehabilitation.

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.

In fiscal year 2019/2020, staff will tether additional outreach activities during the weekends following a booth event. These outreach opportunities are designed to capitalize on existing publicity of the event and generate awareness of Authority-funded projects and Authority preserves near the event site.

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, 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 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 of the Board 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. 2019/2020 Budget Details
- D. 2019/2020 Salary Pay Plan

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Appendix A: Strategies and Objectives

Strategy 1 – Land Protection and Conservation Initiatives

- Objective 1 – Pursue permanent protection of open space and agricultural lands through implementation of the Valley Greenprint through acquisitions, conservation easements 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, economic benefits
- Objective 3 – Plan and implement multi-benefit projects to secure permanent protection of Coyote Valley

Strategy 2 – Visitor Use, Facilities, and Capital Improvements

- Objective 1 – Create and implement strategic use and management plans for agency properties
- Objective 2 – Plan and implement new visitor facilities and new ecological restoration projects on Authority properties
- Objective 3 – Maintain and repair existing agency facilities and assets

Strategy 3 – Natural and Cultural Resources Management

- Objective 1 – Develop resource policies and programs and monitoring plans
- Objective 2 – Prepare and implement plans to protect, restore and enhance natural habitats

Strategy 4 – Community Engagement and Investment in Urban Communities

- Objective 1 – Invest in urban greening and open spaces to benefit the environment and local communities
- Objective 2 – Engage the public, with an emphasis on diversity and youth, through volunteer, outreach, and environmental education programs
- Objective 3 – Build public awareness of the importance of nature and open space for the community and region

Strategy 5 – Authority Organizational Sustainability

- Objective 1 – Develop and implement long-range funding and investment strategies
- Objective 2 – Develop and implement strategic staffing and retention strategies
- Objective 3 – Increase agency operating efficiencies and efficacies
- Objective 4 – Ensure good governance and transparency practices



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Appendix B: Tier 2 Projects

Project Name	Project Description
33 Las Colinas Facilities Improvements	<ul style="list-style-type: none"> • Rezone A/C vents to improve ventilation and prevent fumes coming from the warehouse from entering into office areas • 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
Palassou Ridge Open Space Preserve Grazing Improvements	<ul style="list-style-type: none"> • Scope the feasibility and cost of installing boundary fencing and other grazing infrastructure on the preserve
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"> • Repair roof on Palassou barn and bat house
Vilas House Demolition	<ul style="list-style-type: none"> • Remove house at Vilas • Restore of house site and yard area
Llagas Barn Demolition	<ul style="list-style-type: none"> • Replace existing barn with prefabricated metal barn structure
Vilas Runway Restoration	<ul style="list-style-type: none"> • Identify runway removal constraints • Rehabilitate runway • Restore hydrology, grind asphalt, and other work as needed
Furtado House Improvements	<ul style="list-style-type: none"> • Convert existing house into overnight camp area
Sierra Vista Pond Restoration	<ul style="list-style-type: none"> • Evaluate viability of restoring off-channel pond in the Furtado pasture and make necessary improvements
Sierra Vista Riparian Fencing	<ul style="list-style-type: none"> • Fencing of the main drainage at Sierra Vista Open Space Preserve (Furtado pasture)

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Appendix C: 2019/2020 Budget Detail Report

**APPROVED FY2019/2020 Budget
Full Detail**

	APPROVED FY19/20 District One	APPROVED FY19/20 Reserve	APPROVED FY19/20 Measure Q	APPROVED FY19/20 MQ UOS	APPROVED FY19/20 Grants	APPROVED FY19/20 TOTAL
Income/Revenue						
INCOME SOURCES		240,000	5,000,000	667,918		5,907,918
5000 - REVENUES						
5100 - Revenue	4,347,417	0	8,035,104	700,000	0	13,082,521
5101 - (Less) Funding Allocations	0	0	0	0	0	0
5200 - Interest Income	70,000	200,000	150,000	0	0	420,000
5300 - Grants	0	0	0	0	728,948	728,948
5400 - Donations	0	0	0	0	0	0
5500 - Land Sales	0	0	0	0	0	0
5600 - Land Use Income	0	0	0	0	0	0
5601 - Lease Income	16,800	0	115,573	0	0	132,373
5602 - Grazing Lease Income	18,000	0	0	0	0	18,000
5603 - Use Permit Income	0	0	0	0	0	0
Total Land Use Income	34,800	0	115,573	0	0	150,373
5700 - Land Management Income						
5701 - VTA	55,000	0	0	0	0	55,000
5702 - SCVWD	45,000	0	0	0	0	45,000
5703 - Waste Management	0	0	0	0	0	0
5704 - Valley Habitat Agency	95,000	0	0	0	0	95,000
Total Land Mgmt Income	195,000	0	0	0	0	195,000
5800 - Rebates						
5801 - Cal Card Rebate Income						0
5802 - CSDA Card Rebate Income						0
5900 - Other						
5901 - Family Farm Feast Event Income						0
TOTAL INCOME SOURCES	4,647,217	440,000	13,300,677	1,367,918	728,948	20,484,760

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**APPROVED FY2019/2020 Budget
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Expense						
6000 - PAYROLL						
6000 - General Manager	73,499	0	136,498	0	0	209,997
6002 - Manager(s)	358,817	0	435,598	0	0	794,416
6003 - Staff	1,200,965	0	1,608,700	0	0	2,809,665
6004 - Overtime	13,150	0	13,650	0	0	26,800
6005 - Seasonals	6,900	0	0	0	0	6,900
6006 - Stipends	12,900	0	0	0	0	12,900
Total Payroll	1,666,231	0	2,194,447	0	0	3,860,678
6100 - BENEFITS & EMPLOYEE EXPENSES						
6110 - Health Insurance	408,974	0	503,301	0	0	912,275
6120 - Vision Care	1,974	0	2,320	0	0	4,294
6130 - Dental	24,966	0	29,855	0	0	54,820
6140 - Life Insurance	454	0	545	0	0	999
6150 - Employer Taxes	49,987	0	65,833	0	0	115,820
6160 - CALPERS Retirement Plan	207,683	0	278,927	0	0	486,610
6170 - 401A	4,594	0	8,531	0	0	13,125
6180 - Employee Assistance Program	497	0	607	0	0	1,104
6190 - Tuition Reimbursement	3,000	0	0	0	0	3,000
Total Benefits and Employee Expenses	702,128	0	889,920	0	0	1,592,048
6200 - TRAVEL AND EXPENSES						
6210 - Mileage Reimbursement	8,200	0	3,000	0	0	11,200
6220 - Travel Airfare	11,450	0	0	0	0	11,450
6230 - Travel Lodging	13,700	0	0	0	0	13,700
6240 - Travel Meals and Entertainment	5,150	0	0	0	0	5,150
6250 - Travel Transportation	3,600	0	0	0	0	3,600
Total Travel and Expenses	42,100	0	3,000	0	0	45,100
6300 - SUPPLIES AND CONSUMABLES						
6310 - Meals and Catering	12,125	0	3,000	0	0	15,125

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6320 - Office Supplies	16,500	0	0	0	0	16,500
6330 - Kitchen Supplies	6,500	0	0	0	0	6,500
6340 - Outreach Supplies	8,000	0	0	0	0	8,000
6350 - Postage & Courier	4,600	0	0	0	0	4,600
6360 - Printing Expenses	21,000	0	15,000	0	0	36,000
6370 - Health & Safety Supplies	3,750	0	18,000	0	0	21,750
6380 - Uniforms and Apparel	6,000	0	2,500	0	0	8,500
6390 - Land Management	0	0	0	0	0	0
6391 - Fuel and Consumables	0	0	28,000	0	0	28,000
6392 - Waste & Hazmat Disposable	0	0	0	0	0	0
6393 - Fire Management	0	0	0	0	0	0
6394 - Vegetation Management	4,000	0	20,000	0	0	24,000
6395 - Roads and Trails	15,000	0	35,000	0	0	50,000
6396 - Wildlife Management & Pest Control	0	0	6,500	0	0	6,500
6397 - Signs and Fencing	0	0	42,000	0	0	42,000
6398 - Grazing	2,000	0	15,000	0	0	17,000
6399 - Miscellaneous	0	0	0	0	0	0
Total Supplies and Consumables	99,475	0	185,000	0	0	284,475
6400 - OUTSIDE SERVICES/CONSULTANTS						
6410 - Accounting and Finance Services						
6411 - Bookkeeping	0	0	0	0	0	0
6412 - Audit	13,300	0	2,000	0	0	15,300
6413 - Financial Advisory	55,000	0	0	0	0	55,000
6414 - Grant Preparation	0	0	25,000	0	0	25,000
6420 - Management and Organizational Services						
6421 - Government Relations	70,000	0	0	0	0	70,000
6422 - Redistricting	0	0	0	0	0	0
6423 - Strategic Planning	25,000	0	0	0	0	25,000
6424 - Risk Management	0	0	0	0	0	0
6425 - Engineering Services	20,298	0	7,799	0	0	28,097
6430 - Legal						
6431 - Legal Counsel - Redistricting	0	0	0	0	0	0
6432 - Legal Counsel - Special Counsel	5,000	0	0	0	0	5,000

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6433 - Legal Counsel - General	145,000	0	115,000	0	0	260,000
6434 - Legal Counsel - Litigation	0	85,000	25,000	0	0	110,000
6435 - Legal Counsel - Employment Law	1,000	0	0	0	0	1,000
6440 - Staff Development						
6441 - Recruitment Services & Support	0	0	0	0	0	0
6442 - Workforce Optimization & Development	59,470	0	0	0	0	59,470
6444 - Policy Development & Support	0	0	0	0	0	0
6445 - Temp Services	56,000	0	0	0	0	56,000
6446 - HR Support Services	3,500	0	0	0	0	3,500
6450 - Computer and IT Services						
6451 - IT Services	11,250	0	0	0	0	11,250
6452 - Website and Domain	40,800	0	25,000	0	0	65,800
6453 - ERP	31,000	0	0	0	0	31,000
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						
6461 - Design and Content Services	20,000	0	78,000	0	0	98,000
6462 - Media Services	10,000	0	55,000	0	0	65,000
6463 - Photography & Video	7,000	0	2,500	0	0	9,500
6464 - Community Relations	0	0	25,000	0	0	25,000
6465 - Transportation Services	0	0	25,000	0	0	25,000
6466 - Environmental Education Partnerships	0	0	8,000	0	0	8,000
6470 - Resource Management Services						
6471 - Site Monitoring	29,751	0	13,000	0	0	42,751
6472 - Wildlife Management	0	0	23,000	0	78,948	101,948
6473 - Vegetation Management	5,934	0	25,000	0	0	30,934
6474 - Resource Assessment/Env Review	0	0	175,000	0	0	175,000
6475 - Public Access/Facilities Maintenance	75,000	0	3,000	0	0	78,000
6476 - Fire Management	0	0	68,336	0	0	68,336
6477 - IPM/Pest Control	0	0	55,000	0	0	55,000
6478 - Agricultural Improvements	0	0	2,000	0	0	2,000

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6479 - Grazing Programs	8,000	0	27,000	0	300,000	335,000
6480 - Planning Services						
6481 - General/Other Planning Services	0	0	100,000	0	0	100,000
6482 - Conservation Planning	0	0	209,000	0	0	209,000
6483 - Mapping & GIS Services	43,000	0	80,000	0	0	123,000
6484 - Long-Range Planning	0	0	20,000	0	0	20,000
6485 - Environmental Planning/CEQA	0	0	349,540	0	0	349,540
6486 - Environmental - Site Assessments	0	0	215,000	0	0	215,000
6487 - Prime Design	0	0	120,000	0	75,000	195,000
6488 - Prime Engineering	0	0	40,000	0	25,000	65,000
6489 - Other Design/Engineering	0	0	66,460	0	0	66,460
6490 - Acquisition and CIP Services						
6491 - Surveys & Investigations	0	0	120,000	0	0	120,000
6492 - Brokerage/Transactions	0	0	0	0	0	0
6493 - Appraisals	0	0	130,000	0	0	130,000
6494 - Project/Construction Mgmt/Consult	0	0	5,000	0	0	5,000
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	140,000	0	250,000	390,000
6499 - Contingency	0	0	0	0	0	0
Total Outside Services/Consultants	750,303	85,000	2,379,635	0	728,948	3,943,886
6500 - OTHER SERVICES AND EXPENSES						
6510 - Risk Management						
6511 - Worker's Compensation	38,602	0	113,913	0	0	152,514
6512 - Insurance Claim Loss	5,000	0	0	0	0	5,000
6513 - Liability SLIP	24,200	0	0	0	0	24,200
6514 - Liability SPIP	24,200	0	0	0	0	24,200
6515 - Crime	1,815	0	0	0	0	1,815
6516 - Safety Program	4,500	0	0	0	0	4,500
6520 - Fees						
6521 - Payroll and Accounting	10,500	0	0	0	0	10,500
6522 - Bank and County Wire	2,000	0	0	0	0	2,000

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6523 - Special Assessments	14,000	0	0	0	0	14,000
6524 - Permit	0	0	235,500	0	0	235,500
6525 - Escrow	0	0	0	0	0	0
6526 - Other	5,000	0	0	0	0	5,000
6527 - Election Costs	100,000	0	0	0	0	100,000
6528 - Public Notices	400	0	750	0	0	1,150
6529 - 1% County Collectors Fee	43,474	0	80,351	0	0	123,825
6530 - Advertising and Promotion	28,500	0	0	0	0	28,500
6540 - Interp & Educational Program Expenses	2,500	0	2,500	0	0	5,000
6550 - Event Production Expenses	0	0	0	0	0	0
6560 - Volunteer Program Expenses						
6562 - Recognition	4,000	0	0	0	0	4,000
6563 - Miscellaneous	1,500	0	0	0	0	1,500
6570 - Meetings and Conferences	22,800	0	0	0	0	22,800
6580 - Training and Seminars	23,376	0	0	0	0	23,376
6590 - Recruiting	0	0	0	0	0	0
6591 - Job Postings/Ads	7,200	0	0	0	0	7,200
6592 - Pre-employment Testing	500	0	0	0	0	500
6593 - Assessments	9,600	0	0	0	0	9,600
Total Other Services and Expenses	373,667	0	433,014	0	0	806,681
6600 - EQUIPMENT AND MAINTENANCE						
6610 - Shop Equipment	0	0	2,000	0	0	2,000
6620 - Field Equipment	6,000	0	5,000	0	0	11,000
6630 - Small Tools	0	0	3,000	0	0	3,000
6640 - Office Equipment	13,950	0	0	0	0	13,950
6650 - Computers						
6651 - Equipment	24,605	0	0	0	0	24,605
6652 - Software (Boxed)	0	0	0	0	0	0
6653 - Software (Subscription)	112,512	0	18,000	0	0	130,512
6654 - Data Backup	5,400	0	0	0	0	5,400
6660 - Office Furniture	0	0	0	0	0	0
6670 - Vehicles	60,000	0	0	0	0	60,000
6680 - Fleet Maintenance	0	0	60,000	0	0	60,000

Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2019/2020

**APPROVED FY2019/2020 Budget
Full Detail**

	APPROVED FY19/20 District One	APPROVED FY19/20 Reserve	APPROVED FY19/20 Measure Q	APPROVED FY19/20 MQ UOS	APPROVED FY19/20 Grants	APPROVED FY19/20 TOTAL
6690 - Equipment Maintenance	0	0	10,000	0	0	10,000
Total Equipment and Maintenance	222,467	0	98,000	0	0	320,467
6700 - FACILITIES AND UTILITIES						
6710 - Rent	0	0	0	0	0	0
6720 - Moving Expenses	0	0	0	0	0	0
6730 - Building Maintenance and Repair	20,360	155,000	20,500	0	0	195,860
6740 - Landscaping and Plantscaping	17,000	0	0	0	0	17,000
6750 - Janitorial Services	50,000	0	0	0	0	50,000
6760 - Alarm Services	1,380	0	0	0	0	1,380
6770 - Internet and Phone	24,300	0	0	0	0	24,300
6780 - Radio and Cellular	58,588	0	0	0	0	58,588
6790 - Utilities						
6791 - Garbage	5,400	0	0	0	0	5,400
6792 - Water	10,000	0	0	0	0	10,000
6793 - Electricity & Gas	60,000	0	1,000	0	0	61,000
6794 - Sewer	1,200	0	0	0	0	1,200
Total Facilities and Utilities	248,228	155,000	21,500	0	0	424,728
6800 - MEMBERSHIPS AND SPONSORSHIPS						
6810 - Professional Sponsorships	32,000	0	0	0	0	32,000
6820 - Library (Books and other Media)	500	0	0	0	0	500
6830 - Memberships & Dues	20,675	0	0	0	0	20,675
6840 - Subscriptions	4,600	0	3,000	0	0	7,600
Total Memberships and Library	57,775	0	3,000	0	0	60,775
6900 - FEE TITLE & CONSERVATION EASEMENTS						
6910 - Fee Title	240,000	0	6,243,000	0	0	6,483,000
6920 - Conservation Easements	0	0	0	0	0	0
Total Fee Title and Conservation	240,000	0	6,243,000	0	0	6,483,000

Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2019/2020

**APPROVED FY2019/2020 Budget
Full Detail**

	APPROVED FY19/20 District One	APPROVED FY19/20 Reserve	APPROVED FY19/20 Measure Q	APPROVED FY19/20 MQ UOS	APPROVED FY19/20 Grants	APPROVED FY19/20 TOTAL
6950 - OSA GRANT PROGRAMS						
6951 - District 1 20% Funding	140,000	0	0	0	0	140,000
6952 - Measure Q Urban Open Space Grant	0	0	0	900,000	0	900,000
6953 - Measure Q Env Edu Grant	0	0	0	100,000	0	100,000
6954 - Measure Q Grant Allocation	0	0	700,000	0	0	700,000
Total OSA Grant Programs	140,000	0	700,000	1,000,000	0	1,840,000
TOTAL EXPENSES	4,542,374	240,000	13,150,515	1,000,000	728,948	19,661,838

Santa Clara Valley Open Space Authority

APPROVED Budget and Annual Work Plan for Fiscal Year 2019/2020

Appendix D: APPROVED 2019/2020 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	\$24.78	\$26.02	\$27.32	\$28.69	\$30.12	\$4,295	\$5,221	\$51,541	\$62,649
Administrative Assistant Open Space Technician I	15	\$27.99	\$29.38	\$30.85	\$32.40	\$34.02	\$4,851	\$5,896	\$58,210	\$70,755
Open Space Technician II	19	\$30.85	\$32.40	\$34.02	\$35.72	\$37.50	\$5,348	\$6,501	\$64,177	\$78,007
Planning Technician	21	\$32.40	\$34.02	\$35.72	\$37.50	\$39.38	\$5,615	\$6,826	\$67,386	\$81,908
Executive Assistant	22	\$33.21	\$34.87	\$36.61	\$38.44	\$40.36	\$5,756	\$6,996	\$69,070	\$83,955
Community Engagement Coordinator	23	\$34.02	\$35.72	\$37.50	\$39.38	\$41.35	\$5,896	\$7,167	\$70,755	\$86,003
Deputy Clerk of the Board Educational Programs Coordinator Equipment Mechanic Operator Staff Accountant	24	\$34.87	\$36.61	\$38.44	\$40.36	\$42.38	\$6,044	\$7,346	\$72,524	\$88,153
Lead Open Space Technician	25	\$35.72	\$37.50	\$39.38	\$41.35	\$43.41	\$6,191	\$7,525	\$74,293	\$90,303
Grants Coordinator IT Technician	26	\$36.61	\$38.44	\$40.36	\$42.38	\$44.50	\$6,346	\$7,713	\$76,150	\$92,561
Supervising Open Space Technician Volunteer Programs Administrator	28	\$38.44	\$40.36	\$42.38	\$44.50	\$46.73	\$6,663	\$8,099	\$79,957	\$97,189
Communications Specialist Legislative Specialist	29	\$39.38	\$41.35	\$43.41	\$45.59	\$47.86	\$6,826	\$8,297	\$81,908	\$99,559
Assistant Open Space Planner	31	\$41.35	\$43.41	\$45.59	\$47.86	\$50.26	\$7,167	\$8,711	\$86,003	\$104,537
Accounting/Finance Analyst Grants Administrator Office and HR Administrator	32	\$42.38	\$44.50	\$46.73	\$49.06	\$51.51	\$7,346	\$8,929	\$88,153	\$107,150
Conservation GIS Coordinator Real Property Specialist Resource Management Specialist	33	\$43.41	\$45.59	\$47.86	\$50.26	\$52.77	\$7,525	\$9,147	\$90,303	\$109,764
Associate Open Space Planner	35	\$45.59	\$47.86	\$50.26	\$52.77	\$55.41	\$7,902	\$9,604	\$94,818	\$115,252
Clerk of the Board	36	\$46.73	\$49.06	\$51.51	\$54.09	\$56.79	\$8,099	\$9,844	\$97,189	\$118,133
Senior Open Space Planner	39	\$50.26	\$52.77	\$55.41	\$58.18	\$61.09	\$8,711	\$10,589	\$104,537	\$127,065
Director of Administrative Operations External Affairs Manager Field Operations Manager Planning Manager Assistant General Manager	47 54	\$61.09 \$72.49	\$64.14 \$76.11	\$67.35 \$79.92	\$70.72 \$83.91	\$74.25 \$88.11	\$10,589 \$12,564	\$12,871 \$15,272	\$127,065 \$150,771	\$154,449 \$183,264

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