




DATE: December 7, 2020

MEMO TO: Board of Directors

THROUGH: Ana Ruiz, General Manager 

FROM: Mike Bower, Budget & Analysis Manager

SUBJECT: Progress Update on Measure AA Commitments

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## Measure AA Overall Completion Percentage

In June 2014, voters approved Measure AA (MAA), a 30-year, \$300 million general obligation bond to protect natural and working lands; open preserve lands to the public; construct public access improvements such as new trails and parking/staging areas; and restore and enhance open space land, forests, streams, watersheds, and coastal ranch areas. Projects are grouped in 25 key project portfolios organized by geographic area within the Midpeninsula Regional Open Space District's (District) boundaries. Proceeds are generated from a series of bond sales over a 20 to 30 year period.

The District began using MAA funds in 2014 and the prior Fiscal Year 2019-20 marks the completion of the sixth year of funding. The table on the following page estimates an MAA overall completion percentage range. The overall MAA completion range is determined by using two different methods for estimating the completion percentage of each MAA portfolio and then calculating a weighted average of all portfolios using two different weighting methods. In the following chart:

- The first column estimates the percent completion for each portfolio based on the estimated projects/tasks completed within each portfolio as shown in the "Measure AA Bond Annual Accountability Report". The project completion percentages for each portfolio are derived from the "Portfolio Progress Indicators" moon-charts described in the report.
- The second column estimates the percent completion for each portfolio based on the inception-to-date actual spend through June 30, 2020 (FY20) and the Budget expenditures for FY21 through FY23 for projects underway as compared to the total MAA allocated portfolio expenditure shown in the "Measure AA Bond Annual Accountability Report".
- The last two columns in the chart are used to weight the completion percentages in the first two columns to arrive at the matrix of results at the bottom of the chart (green shaded area). The third column shows an equal weighting by portfolio (i.e. each portfolio is 1/25<sup>th</sup>) while the fourth column reflects a weighting by portfolio to the total \$300 million expenditure allocation.

Applying the two portfolio completion estimation methods to the two weighting methods estimates an overall MAA completion and committed percentage of between 31.6% and 37.8% (as shown in the green shaded area at the bottom of the chart). This compares to currently being almost 22% (6.5 years) through the 30 year MAA timeframe.

MAA Overall Completion Estimate		Estimated Total Percent Complete of			
		Portfolio Commitments			
		Based on the	Inception-to-Date	Portfolio Weighting	
		Average of the	Through FY23	Equal	By Allocation
		Portfolio Projects	(Actual & Budget)	Weight	\$
		Estimated	Total Net* Spend as		
Portfolio 1	Miramontes Ridge	5%	1%	4.0%	9.3%
Portfolio 2	Regional	83%	59%	4.0%	1.7%
Portfolio 3	Purisima Creek Redwoods	25%	88%	4.0%	2.5%
Portfolio 4	El Corte de Madera Creek	58%	12%	4.0%	2.8%
Portfolio 5	La Honda Creek	25%	43%	4.0%	3.9%
Portfolio 6	Windy Hill	0%	2%	4.0%	4.2%
Portfolio 7	La Honda Creek	75%	84%	4.0%	4.9%
Portfolio 8	La Honda Creek and Russian Ridge	13%	14%	4.0%	5.1%
Portfolio 9	Russian Ridge	88%	12%	4.0%	1.9%
Portfolio 10	Coal Creek	50%	44%	4.0%	2.7%
Portfolio 11	Rancho San Antonio	33%	2%	4.0%	3.6%
Portfolio 12	Peninsula/South Bay Cities	8%	0%	4.0%	0.3%
Portfolio 13	Cloverdale Ranch	0%	0%	4.0%	5.2%
Portfolio 14	Regional	13%	0%	4.0%	1.3%
Portfolio 15	Regional	13%	9%	4.0%	16.9%
Portfolio 16	Long Ridge	0%	0%	4.0%	1.7%
Portfolio 17	Regional	50%	21%	4.0%	2.6%
Portfolio 18	South Bay Foothills	88%	94%	4.0%	0.5%
Portfolio 19	El Sereno	63%	69%	4.0%	0.8%
Portfolio 20	South Bay Foothills	25%	44%	4.0%	4.7%
Portfolio 21	Bear Creek Redwoods	80%	93%	4.0%	5.8%
Portfolio 22	Sierra Azul	30%	63%	4.0%	2.2%
Portfolio 23	Sierra Azul	100%	77%	4.0%	9.3%
Portfolio 24	Sierra Azul	13%	16%	4.0%	3.4%
Portfolio 25	Sierra Azul	8%	5%	4.0%	2.7%
All Portfolios				100.0%	100.0%
<b>Total MAA Estimated Percent Complete</b>					
Average of Portfolio Projects Estimated Completion				37.8%	34.5%
Total Net* Spend and Committed as % of Allocation				34.1%	31.6%
* Net expenditure after reducing for grants					

Since MAA's inception in 2014, MAA related accomplishments include:

- 1,976 acres preserved
- 20.1 miles of additional trail opened to public access
- Closing a critical 0.6-mile gap to establish 80 miles of continuous Bay Trail access
- 3 new parking areas with a total of 126 new parking spaces created
- Expanded the conservation grazing program by 315 additional acres
- Three (3) new preserves/preserve areas opened to the public - Mount Umumhum Summit of Sierra Azul Open Space Preserve, lower La Honda Creek Open Space Preserve, and Bear Creek Redwoods Open Space Preserve

- \$19.9 million in total investments on coastsides projects

A full description of all MAA accomplishments can be found in the “Measure AA Bond Annual Accountability Report” accessible via the District’s website (<https://www.openspace.org/about-us/district-reports>).

### **MAA Five-Year Project List Progress**

At the Board Retreat on March 15, 2018, the Board approved the MAA Five-Year Project List for FY19 to FY23, which includes 53 projects that should be started but not necessarily completed within the five-year timeframe. As of June 30, 2020, 13 items have been completed, 34 items are in progress, and 6 have not yet begun.

The primary activities completed in FY20 include:

- MAA03 - Lot Line Adjustment and Property Transfer - Purisima Upland
- MAA04 - Oljon Trail construction
- MAA17 - Stevens Creek Nature Trail Bridges (2) construction
- MAA17 - Lysons Demolition & Site Restoration
- MAA21 - Pond Improvements

In addition to the activities completed in FY20 (which ends June 30, 2020), “MAA02 - Opening of the Ravenswood Bay Trail to the public” was completed soon after in August 2020.

Those projects that have not yet begun include:

- MAA01 - Madonna Bridge Replacement
- MAA03 - Purisima Uplands Parking Area, Trails, Invasive Species Removal and Restoration
- MAA05 - Phase 2 - Paulin Bridge Replacements (2)
- MAA09 - Road & Trail Projects - Charquin Trail
- MAA16 - Trail Connections to Eagle Rock and Devil's Canyon
- MAA17 - Upper Stevens Creek Trail - Complete Trails Master Plan and environmental review, design and construction plans (in partnership with Santa Clara County Parks)

The stated goal is to start work on the remaining 6 projects by FY23.

The following table lists the status of each MAA Five-Year Project List project by portfolio *as of June 30, 2020*. As previously noted, a full description of all MAA accomplishments can be found in the “Measure AA Bond Annual Accountability Report” accessible via the District’s website (<https://www.openspace.org/about-us/district-reports>).

MAA Portfolio No.	Project Name	Status
<b>MAA01- Miramontes Ridge:</b> <i>Gateway to the Coast Public Access, Stream Restoration and Agriculture Enhancement</i>	Madonna Bridge Replacement	Not started
	Water Infrastructure Development	In progress
	Pursue Land Conservation Opportunities	In progress
	Pursue Public Access Partnerships with Other Public Agencies	In progress
<b>MAA02- Regional:</b> <i>Bayfront Habitat Protection and Public Access Partnerships</i>	Pursue Land Conservation Opportunities	Complete
	Cooley Landing - Interpretative Facilities & Infrastructure	Complete
	Ravenswood Bay Trail	Complete
<b>MAA03- Purisima Creek Redwoods:</b> <i>Purisima-to-Sea Trail, Watershed Protection, and Conservation Grazing</i>	Grazing and Water Systems Infrastructure	In progress
	Site Clean Up and Soil Remediation Post-Purchase (Giusti - Purisima uplands)	In progress
	Pursue Land Conservation Opportunities	In progress

	Lot Line Adjustment / Property Transfer (Giusti - Purisima Uplands) and Protection of Lobitos Creek Watershed	Complete
	Purisima Uplands Parking Area, Trails, Invasive Species Removal and Restoration	Not started*
<b>MAA04- El Corte de Madera Creek:</b> <i>Bike Trail and Water Quality Projects</i>	Oljon Trail	Complete
	Phase 2 - Paulin Bridge Replacements (2)	Not started
	Fisheries Restoration	In progress
	Red Barn Public Access Area	In progress
	Phase II Trail Design & Implementation - Red Barn to Main Ranch Road (connects to La Honda Creek loop)	In progress
	Grazing and Water Systems Infrastructure	In progress
<b>MAA05- La Honda Creek:</b> <i>Upper Area Recreation, Habitat Restoration and Conservation Grazing Projects</i>		
<b>MAA Portfolio No.</b>	<b>Project Name</b>	<b>Status</b>
<b>MAA06- Windy Hill:</b> <i>Trail Improvements, Preservation and Hawthorns Area Historic Partnership</i>	Hawthorns Property Site Specific Plan Implementation	In progress
	Hawthorns Property Public Access Site Plan	In progress
<b>MAA07- La Honda Creek:</b> <i>Driscoll Ranch Public Access, Endangered Wildlife Protection and Conservation Grazing</i>	Redwood Restoration and Road Rehabilitation	In progress
	Phase II Trails Design & Implementation - La Honda Creek Loop	In progress
<b>MAA08- La Honda/Russian Ridge:</b> <i>Preservation of Upper San Gregorio Creek Watershed &amp; Ridge Trail Completion</i>	Pursue Land Conservation Opportunities	In progress
	Road & Trail Projects - Charquin Trail	Not started
	Grazing Infrastructure Assessment, Scoping, & Implementation	In progress
	Grazing Lease	
	Water Systems Infrastructure	
	Pond Improvements (1-2 ponds)	In progress**
<b>MAA09- Russian Ridge:</b> <i>Public Recreation, Grazing and Wildlife Protection Projects</i>		
<b>MAA10- Coal Creek:</b> <i>Reopen Alpine Road for Trail Use</i>	Alpine Road Trail Improvements	In progress
<b>MAA11- Rancho San Antonio:</b> <i>Interpretive Improvements, Refurbishing, and Transit Solutions</i>	Interpretive Facility Improvements at Deer Hollow Farm	In progress
	Non-Motorized Mobility, Transit Connections and Parking Alternatives	In progress
<b>MAA13- Cloverdale Ranch:</b> <i>Wildlife Protection, Grazing, and Trail Connections</i>	Pursue Land Conservation Opportunities	In progress
<b>MAA16- Long Ridge:</b> <i>Trail, Conservation and Habitat Restoration Projects</i>	Trail Connections to Eagle Rock and Devil's Canyon	Not started
	Stevens Creek Nature Trail Bridges (2)	Complete
	Lysons Demolition & Site Restoration; assess water rights and stream restoration	Complete
<b>MAA17- Regional:</b> <i>Complete Upper Stevens Creek Trail</i>	Upper Stevens Creek Trail - Complete Trails Master Plan and environmental review, design and construction plans (in partnership with Santa Clara County Parks)	Not started
<b>MAA18, 19, 20, 21, 22, 23, 25:</b> <i>Multiple</i>	Purchase San Jose Water Company Watershed Lands	In progress
<b>MAA20- South Bay Foothills:</b> <i>Wildlife Passage and Ridge Trail Improvements</i>	HWY 17 Bay Area Ridge Trail Crossing	In progress
	HWY 17 Wildlife Crossing	In progress
	Pond Improvements	Complete
	Bat Relocation / Re-housing	Complete
	Water Infrastructure Improvements	In progress
	Alma College Site Rehabilitation	In progress
	Alma College Parking Lot at Gate BC04	Complete
	Webb Creek Bridge Replacement	Complete
	Bear Creek Redwoods Public Access (PHASE I)	Complete
	Bear Creek Stables Site Plan (PHASE I)	In progress
	Phase II Trails - Multi Use Links	In progress
<b>MAA21- Bear Creek Redwoods:</b> <i>Public Recreation and Interpretive Projects</i>		

<b>MAA22- Sierra Azul:</b> <i>Cathedral Oaks Public Access and Conservation Projects</i>	Phase II Trails Public Loop Trail connecting to the Stables	In progress
	Phase II Trails - Briggs Creek Trail	In progress
	Phase II Trails - Alma College Loop Trail	In progress
	Parking Area at Beatty property (Santa Clara County agreement must be complete by 2023)	In progress
	Pursue Land Conservation Opportunities	In progress
<b>MAA24- Sierra Azul:</b> <i>Rancho de Guadalupe Family Recreation</i>	Hendry's Creek Restoration	Complete
	Pursue Land Conservation Opportunities	In progress

\*Project initiated after June 30, 2020.

\*\*Project was completed September 30, 2020.

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