Midpeninsula Regional Open Space District

NOTICE OF SPECIAL AND REGULAR BOARD MEETING
Meeting 25-24

Board Room of the Midpeninsula Regional Open Space District Administrative Office
5050 El Camino Real, Los Altos, CA 94022

AGENDA

Wednesday, August 27, 2025

Special Meeting starts at 5:00 PM
Regular Meeting starts at 7:00 PM*

The Midpeninsula Regional Open Space District (Midpen) Board meetings are held in person at the District's Administrative Office, and by teleconference pursuant to Government Code Section 54953.

PUBLIC ATTENDANCE OPTIONS

1. In person at the Midpen Administrative Office: the Board Room is open to the public during meetings of the Board of Directors.
2. Remotely via Zoom: Join the meeting conference by clicking this link: https://openspace.zoom.us/j/81861680240
3. By phone: dial (669) 900-6833 or (346) 248-7799 and enter the Meeting ID: 818 6168 0240

SUBMITTAL OF PUBLIC COMMENTS

Members of the public may submit written comments to be provided to the Board, or register to make oral comments, as follows:

- Written comments may be submitted via the public comment form at: https://www.openspace.org/public-comment.
- Requests to provide oral comment must be submitted prior to the time when public comment on the agenda item is closed as follows:
  - In-person attendance: submit a request via the paper-based public comment form at the meeting.
  - Remote attendance: submit a request through the public comment form at: https://www.openspace.org/public-comment.
- Any comments received after the deadline will be provided to the Board after the meeting.

5:00 SPECIAL MEETING OF THE BOARD OF DIRECTORS OF THE MIDPENINSULA REGIONAL OPEN SPACE DISTRICT – CLOSED SESSION

ROLL CALL

1. PUBLIC EMPLOYEE PERFORMANCE EVALUATION (Government Code Section 54957(b)(1))
Title of Employee: General Counsel

ADJOURNMENT

7:00 REGULAR MEETING OF THE BOARD OF DIRECTORS OF THE MIDPENINSULA REGIONAL OPEN SPACE DISTRICT

ROLL CALL

REPORT OUT OF CLOSED SESSION

ORAL COMMUNICATIONS
This portion of the agenda is for members of the public to comment on items not on the agenda; however, the Brown Act (Open Meeting Law) does not allow action by the Board of Directors on items not on the agenda. Individuals are limited to one comment during this section.

ADOPTION OF AGENDA

SPECIAL ORDERS OF THE DAY

Introduction of Staff

- Jackie Van Der Hout, Water Resources Specialist

INFORMATIONAL MEMORANDA

- Highway 35 Multi-use Trail Crossing and Parking Area - 65% Design

CONSENT CALENDAR
All items on the Consent Calendar may be approved without discussion by one motion. Board members, the General Manager, and members of the public may request that an item be removed from the Consent Calendar during consideration of the Consent Calendar.

1. Approve the July 23, 2025 meeting minutes

2. Claims Report

3. Authorization to apply for California Hazard Mitigation Grant Funding for the replacement and upsizing of the Bear Creek Redwoods Parking Lot Culvert Mitigation Project (R-25-112)

Staff Contact: Carol Schimke, Grants Program Manager, Administrative Services Department
General Manager's Recommendation: Authorize the General Manager to sign the required local match commitment letter in the amount of $381,250 to secure $1,143,750 in grant funding from the California Office of Emergency Services Hazard Mitigation Grant Program for the Bear Creek Redwoods Parking Lot Culvert Mitigation project and to negotiate and execute the grant agreement.

4. Grant Application with the California Wildlife Conservation Board for the Highway 17 Wildlife Undercrossing Project (R-25-113)

Staff Contact: Carol Schimke, Grants Program Manager, Administrative Services Department
General Manager's Recommendation: Adopt a resolution authorizing the General Manager to apply for up to $13,000,000 in grant funding and negotiate a subsequent grant agreement, if awarded, from the California Wildlife Conservation Board for the Highway 17 Wildlife Undercrossing Project.

5. Updates to Board Policy 3.10-District Grantmaking Program (R-25-114)

Staff Contact: Carol Schimke, Grants Program Manager, Administrative Services Department
General Manager's Recommendations:
Consider the following recommendations as supported by the Legislative, Funding & Public Affairs Committee:

1. Adopt three recommended updates to Board Policy 3.10, *District Grantmaking Program*:
    a. Increase the Grantmaking Program award budget from $250,000 to $300,000, with an increased grant award size in each tier: Tier 1 from $25,000 to $30,000 and Tier 2 to $50,000 to $60,000;
    b. Limit the grantee reimbursement period to a maximum of two years to align with the biennial (every two years) Grantmaking Program cycle and the corresponding release of a new Request for Proposals; and
    c. Funding Priority descriptive updates.
2. Adopt an impact statement that *supports early-stage and grassroots initiatives* for inclusion in Board Policy 3.10, *District Grantmaking Program.*

BOARD BUSINESS
Public comment on agenda items is received at the time each item is considered by the Board of Directors.

6. Amend the Midpeninsula Regional Open Space District's Classification and Compensation Plan for Compensation Study adjustments based on the updated Compensation Philosophy (R-25-115)

Staff Contact: Candice Basnight, Human Resources Manager, Human Resources Department
General Manager's Recommendation: Adopt a resolution amending the District's Classification and Compensation Plan for Compensation Study adjustments based on the updated Compensation Philosophy.

INFORMATIONAL REPORTS – Reports on compensable meetings attended. Brief reports or announcements concerning activities of District Directors and staff; opportunity to refer public or Board questions to staff for information; request staff to report to the Board on a matter at a future meeting; or direct staff to place a matter on a future agenda. Items in this category are for discussion and direction to staff only. No final policy action will be taken by the Board.

A. Committee Reports
B. Staff Reports
C. Director Reports

ADJOURNMENT

**Times are estimated and items may appear earlier or later than listed. The Agenda is subject to a change of order.*

In compliance with the Americans with Disabilities Act, if you need assistance to participate in this meeting, please contact the District Clerk at (650) 691-1200. Notification 48 hours prior to the meeting will enable the District to make reasonable arrangements to ensure accessibility to this meeting.

Written materials relating to an item on this Agenda that are considered to be a public record and are distributed to Board members less than 72 hours prior to the meeting, will be available for public inspection at the District's Administrative Office located at 5050 El Camino Real, Los Altos, California 94022.

CERTIFICATION OF POSTING OF AGENDA

I, Maria Soria, District Clerk for the Midpeninsula Regional Open Space District (MROSD), declare that the foregoing agenda for the special and regular meetings of the MROSD Board of Directors was posted and available for review on August 21, 2025, at the Administrative Offices of MROSD, 5050 El Camino Real, Los Altos, California, 94022. The agenda and any additional written materials are also available on the District's website at http://www.openspace.org.

Maria Soria, MMC, CPMC
District Clerk

Midpeninsula Regional Open Space District

Memorandum

DATE: August 27, 2025

MEMO TO: Board of Directors

THROUGH: Ana Ruiz, General Manager

FROM: Alex Harker – Capital Project Manager III

SUBJECT: Highway 35 Multi-use Trail Crossing and Parking Area - 65% Design

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Summary

The following memo outlines design updates for the Highway 35 Multi-use Trail Crossing and Parking Area Project and how they refine and improve upon the original concept design and are responsive to the Board-approved Staging/Parking Area and Trailhead Design Standard Guidelines.

Conceptual Design Consistency Review

On November 8, 2023, the Board of Directors (Board) reviewed and approved a conceptual plan for the Highway 35 Multi-use Trail Crossing and Parking Area Project (Project) (R-23-137, Minutes) (Attachment 1, page 1) in Purisima Creek Redwoods Open Space Preserve (Preserve). Following approval of the conceptual plan, a contract was awarded to CSW/ST2 Inc., (Consultant) for detailed design and engineering services (R-24-36, Minutes). The design is now at a 65% design development level (Attachment 1, page 2). Overall, the design of the parking area is consistent in the key elements of the project footprint, project layout and site program as approved by the Board.

Staging/Parking Area and Trailhead Design Standard Guidelines Consistency Review

On July 24, 2024, (R-24-98, Minutes), the Board approved the Staging/Parking Area and Trailhead Design Standard Guidelines (Guidelines) as a framework for ensuring appropriate open space and natural/rural aesthetic character and design elements are integrated into District preserve staging/parking areas and trailheads (Attachment 2). In response to the Guidelines, staff developed a design guideline consistency checklist (Checklist) for internal review to ensure compliance. The Checklist is intended to create a consistent review cycle for all District projects in an effective and efficient manner. Staff have reviewed the current Project design against the Checklist (including the recent design refinements described below) and have found it consistent with the Guidelines. The Checklist covers the entire Guidelines document. As an example of

how this checklist is used, the detailed analysis of this Project for consistency with the *Value Statements* of the Guidelines is included in Attachment 3.

Recent Design Refinements

During internal reviews of the Project in relation to the Board-approved conceptual design and Guidelines, staff identified the following refinements that are necessary for project implementation and/or to further promote ecologically sensitive access to District preserves:

Minor Reduction to the Parking Stall Count

The original Board-approved concept plan shows seventy-four (74) standard parking stalls within the parking area and three (3) shoulder parking spaces along Highway 35, for a total of seventy-seven (77) standard parking spaces (plus two equestrian spaces). The revised plan will accommodate sixty-eight (68) standard parking stalls within the parking area and three (3) shoulder parking spaces along Highway 35, for a total of seventy-one (71) standard parking spaces (plus 2 equestrian spaces). The slight decrease in parking stalls was a result of refining the siting of the parking area within the existing topography. The conceptual design's parking count was not reflective of the extent of grading needed. Since that time, detailed grading and further site analysis have been carried out, resulting in a slight reduction in usable space, particularly for the second (lower) terrace of standard parking spaces. The concept plan showed two (2) equestrian parking spaces, and the revised plan does as well.

Sense-of-place Enhancement

The glade-like character of the site is preserved by the open parking terraces stepping down westerly towards the forest. In the proposed parking area, planted slopes will have larger shrubs downslope so as to not obstruct the view out towards the forest. The one exception will be intentional screening in front of the employee residence for privacy.

A bioretention area serves as necessary stormwater management infrastructure that also enhances the glade-like character of the site at its lowest point. This bioretention increases the visibility of the natural drainage patterns on site, flowing across an annual grassland and into the bioretention area. In large storm events, the bioretention will overflow and release excess stormwater into natural drainage channels in the Preserve.

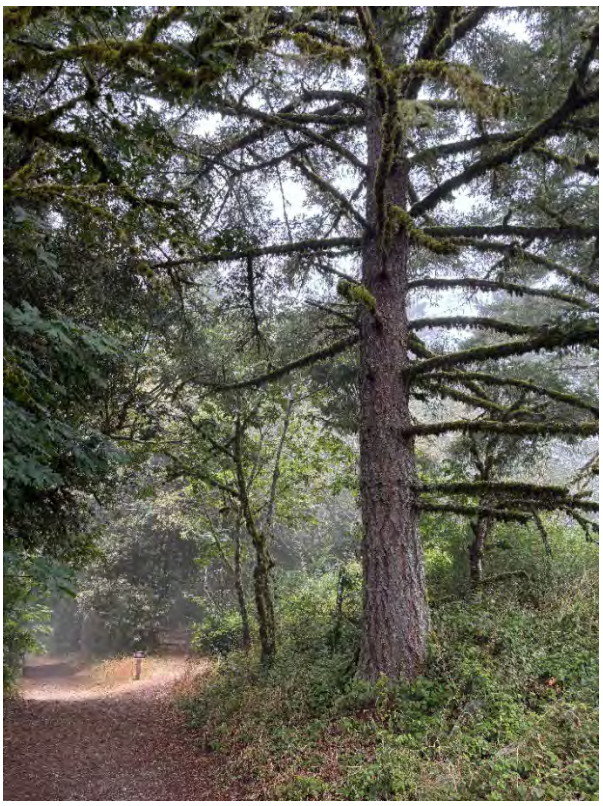
This site is also in the native range for the Kings Mountain manzanita (*Arctostaphylos regismontana),* a rare, native California shrub, specifically endemic to the Santa Cruz Mountains. The revised plan shows this manzanita being planted onsite with an interpretive sign to identify it and its connection to the site's natural history. This manzanita provides an opportunity to showcase the sites unique biological attributes.



The glade-like character of the site with the vista into the forest. The experience of being in a clearing looking out towards the forest will be preserved with the parking area design. The lowest point of the parking area limit-of-work will be a vegetated bioretention area, highlighting the sites' natural drainage pattern.

Trailhead Form and Function

The trailhead has been refined since the conceptual plan to serve programmatic functions and to create an entry into the preserve. Boulders excavated onsite will be used to soften the edges of the hardscape and create a visual transition into the preserve. In addition to enhancing the visitor experience, the trailhead design integrates the functionality required by District maintenance vehicles and emergency vehicle access. The necessary turning radii clearances and road width requirements informed the dimensions of the space and vehicular gate placement. The gate and road can accommodate CalFire truck access and the minimum required width of 16 feet. The existing trail alignment is narrower beyond the proposed parking area, but can be widened as needed as part of a separate project.




To the left: Douglas fir at the trailhead, indicative of the mixed redwood conifer redwood forest where this parking area is situated. To the right: Existing boulders onsite within the limit of work will be excavated during construction for use at the trailhead.

Additional Tree Removal

The conceptual design plan showed three (3) trees to be removed. Further site analysis concluded that an additional five (5) trees will need to be removed, for a total of eight (8) trees. The reasons for this include:

- A follow up tree inventory that revealed additional trees beyond those on the survey. Those trees are within the conceptual design footprint and could not be preserved without significant changes to the Project design.
- Re-grading necessary for the slope down to the equestrian parking spaces.
- Carving out additional space for the trailhead, amenities, and bioretention area.

Of the five (5) additional trees to be removed, two (2) are a non-native Prunus species, two (2) are below the threshold of being a significant tree, only one (1) is a native, significant size tree, a big leaf maple with an 18" diameter trunk. Tree removal impacts, along with other project impacts will be evaluated during the California Environmental Quality Act (CEQA) review process and mitigation will most likely be achieved through the reforestation efforts as part of the Irish Ridge Restoration Project in this Preserve.

Transportation Demand Management Integration

A transit-demand-management consultant, Parametrix, was retained by the District to draft a report on the Purisima Multimodal Access Implementation Project. On December 11, 2024, the Board approved inclusion of shuttle and parking management concepts for Purisima (R-24-155, Minutes) into the CEQA project description for conducting the required environmental review as

part of the Purisima Comprehensive Use and Management Plan (CUMP). While the initial shuttle pilot program will focus on lower Purisima, refinements were made to the concept plan to accommodate the potential future shuttle and other parking management recommendations at this parking area.

A drop-off at the trailhead was dimensioned to fit a shuttle in addition to standard size vehicles. Having the passenger side of the shuttle open onto the trailhead rather than the road required reversing the parking area ingress/egress previously shown on the conceptual plan. Maintaining the existing ingress/egress (as shown on the conceptual plan) and having the passengers exit the righthand side of the shuttle was not possible due to the turning radius and flow-of-traffic requirements. As part of the conceptual design work, a traffic study confirmed adequate line-of-site for both the ingress and egress routes as well as for the Highway 35 crossing. An additional traffic study was performed for this ingress/egress reversal that confirmed the feasibility of this approach.

Parametrix's report also suggested the identification of potential future carpool/reservation parking, and the lower terrace of standard parking stalls was identified as a separate area that could have its own signage for that programmatic use. The report recommended the use of a real-time parking counter. A parking counter is not currently included in the Project, but the parking area is being designed so that it has the electrical capacity to support a parking counter system such as the one currently in use at Rancho San Antonio Preserve.

In addition to the above transit demand management interventions, San Mateo County has determined that the project will need to follow the 2022 California Greenbook Electrical Vehicle (EV) space requirements. EV chargers also support the goals of the Board-approved Climate Action Plan (R-10-10, Minutes). The Project will implement 4 EV charging spaces and 17 EV capable spaces for a parking area this size per San Mateo County and California Greenbook requirements.

Next Steps

The project is now going through CEQA as part of the Purisima Comprehensive Use and Management Plan. With CEQA certification anticipated in summer 2026, construction is scheduled to start in 2028. Any significant changes to the current design would be additional work for the Consultant and could potentially delay the project timeline.

Attachments:

1. Site Plans
2. Staging/Parking Area and Trailhead Design Standard Guidelines
3. Sample Staging/Parking Area and Trailhead Design Standard Guidelines Checklist – Values Statements section

Attachment 1 - Preferred Conceptual Design Option

HWY 35 MULTI-USE TRAIL CROSSING AND PARKING AREA PREFERRED CONCEPT PLAN

PURISIMA CREEK REDWOODS OPEN SPACE PRESERVE

NORTH RIDGE PARKING LOT

Not to scale



PARKING AREA TOTALS	EXISTING		A.1		A.2		B.1		B.2	
	Cars	*Equest.*	*Cars*	*Equest.*	*Cars*	*Equest.*	*Cars*	*Equest.*	*Cars*	*Equest.*
EXISTING LOT + UPPER EXPANSION AREA	26 or 41	2 or 0	50	4	74	0	41	4	61	0
LOWER EXPANSION AREA	0	0	0	0	0	2	0	0	0	2
HWY 35 SHOULDER	10	0	3	0	3	0	3	0	3	0
TOTAL	**36 or 51**	**2 or 0**	**53**	**4**	**77**	**2**	**44**	**4**	**64**	**2**
IMPERVIOUS AREA	17,490 sf		25,000 sf		39,500 sf		22,500 sf		34,750 sf	

NOVEMBER 8, 2023

Attachment 1 - 65% Design



TREE TO BE REMOVED

DISTRICT SIGNAGE

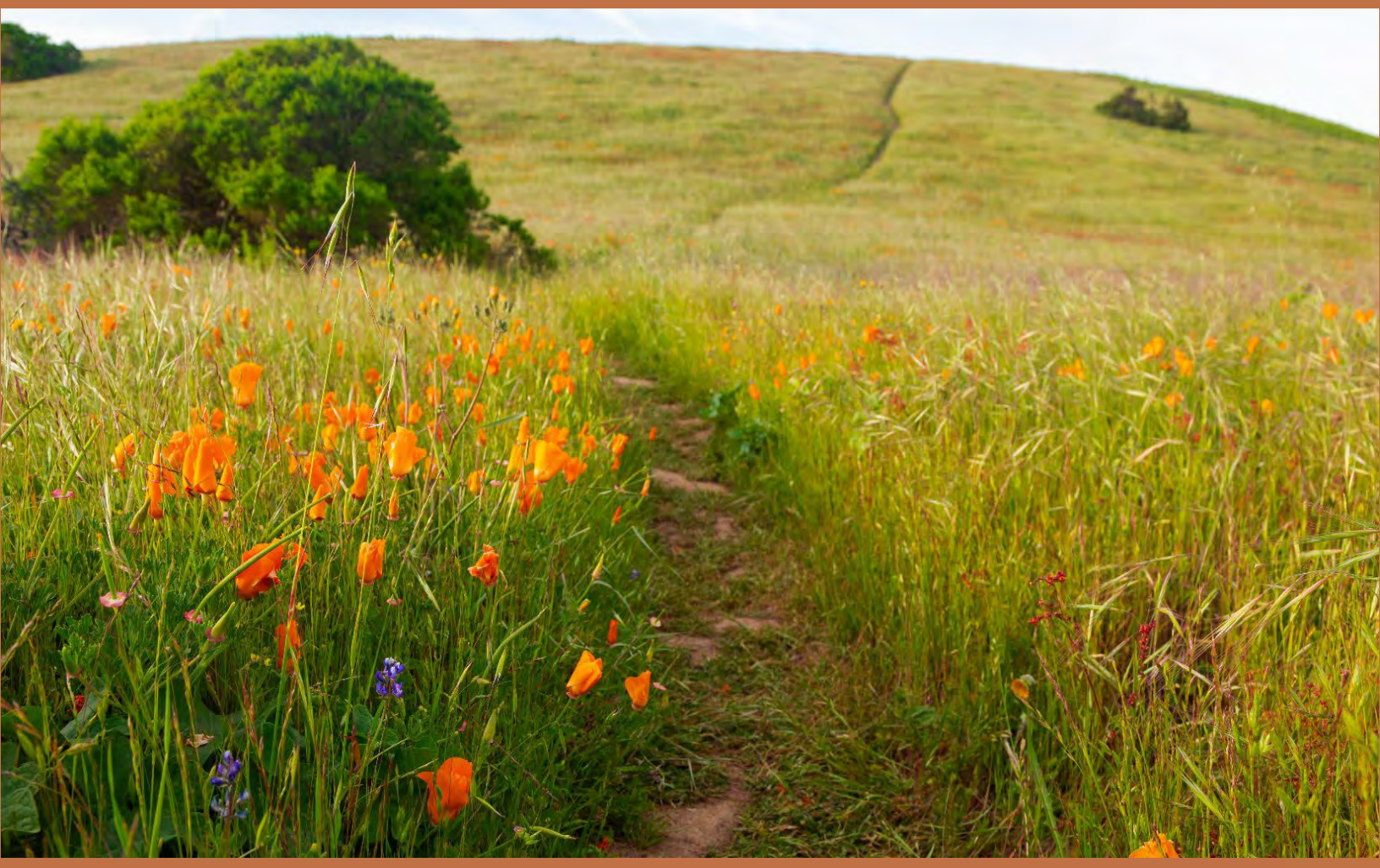
HIGHWAY 35 MULTI-USE TRAIL CROSSING AND PARKING AREA

ATTACHMENT 2

Midpeninsula Regional Open Space District

Staging/Parking Area and Trailhead Design Guidelines

July 24, 2024









Staging/Parking Area and Trailhead Design Guidelines

Approved by the Midpeninsula Regional Open Space District Board
July 24, 2024

The Midpeninsula Regional Open Space District (Midpen) mission is:

"To acquire and preserve a regional greenbelt of open space land in perpetuity, protect and restore the natural environment, and provide opportunities for ecologically sensitive public enjoyment and education."

Within the Coastside Protection Area, the mission expands:

"To acquire and preserve in perpetuity open space land and agricultural land of regional significance, protect and restore the natural environment, preserve rural character, encourage viable agricultural use of land resources and provide opportunities for ecologically sensitive public enjoyment and education."

The Vision Plan Goals approved by the Board of Directors in 2014 encompass:

- ***Outdoor Recreation and Healthy Living.*** Provide accessible open space lands for recreation and outdoor exercise in nature.
- ***Cultural and Scenic Landscape Preservation***. Conserve the area's scenery and rich history; provide places for escape and quiet enjoyment.
- ***Healthy Nature.*** Take care of the land, air, water and soil so that plants and animals thrive and people can receive nature's benefits.
- ***Connecting with Nature and Each Other.*** Provide opportunities for people to learn about and appreciate the natural environment and to connect with nature and each other.
- ***Viable Working Lands.*** Provide viable working lands that reflect our agricultural heritage and provide food and jobs.

Prepared by:

CSW|ST2

121 Park Place, Richmond, CA 94801

www.cswst2.com

Photo Credits: Top: Russian Ridge (Wing Yung), Bottom (left to right): Russian Ridge (Doug McConnell), Rancho San Antonio (Karl Gohl), Purisima Creek Redwoods (Mike Kahn)

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INTRODUCTION

"...to try to save for everyone, for the hostile and indifferent as well as the committed, some of the health that flows down across the green ridges from the Skyline, and some of the beauty and refreshment of spirit that are still available to any resident of the valley who has a moment, and the wit, to lift up his eyes unto the hills."

Wallace Stegner

With over 70,000 acres of connected public open space, Midpeninsula Regional Open Space District's (Midpen) preserves contain diverse and scenic landscapes, from bay wetlands to redwood forests and coastal grasslands, hosting an incredible diversity of life. Midpen's role and responsibilities center on its commitment to the preservation and restoration of these open spaces across the Santa Cruz Mountains.

Midpen's mission is to acquire and preserve a regional greenbelt of open space land in perpetuity, to protect and restore the natural environment, and to provide opportunities for ecologically sensitive public enjoyment and education. On the San Mateo County Coastside, that mission expands to include acquiring and preserving agricultural land of regional significance, to preserve rural character, and to encourage viable agricultural use of land resources. Midpen undertakes its work based on the missions under the guidance of the overarching Basic Policy[1] and other specific policies, such as Resource Management[2] and Agricultural policies[3], the 2014 Vision Plan[4], and the priorities establish by Measure AA[5].

Parking is a key component of public access to Midpen preserves. A parking area serves as a gateway to the preserve and provides visitors with a transition zone between the urban/suburban areas of the greater Bay Area and the preserves' natural open spaces. Parking areas are many visitors' first interface with Midpen's preserves, as such they establish the Midpen identity. Midpen historically provided relatively small gravel parking areas at trailheads. As visitation has grown and more trails have opened for public access, the demand for more and larger parking areas has increased. The passage of Measure AA in 2014 provided needed resources to allow Midpen to shift part of its focus toward expanding public access opportunities across its 27 open space preserves, including adding new parking areas and expanding existing parking areas to better accommodate visitation levels.

Midpen's Basic Policy defines Open Space as land area that is allowed to remain in or return to its natural state. Open space lands:

Protect areas of scenic beauty and preserves natural habitats necessary to sustain plant and animal life, especially native and endangered species.

Offer opportunities to the public for education, recreation, and renewal of spirit.

Enhance public safety by preventing development of areas prone to landslides, earthquake damage, flooding, and wildland fires.

Establish boundaries for urban growth, provides a respite from urban living, and enhances regional quality of life.

In the last 15 years, environmental and ADA regulations, as well as engineering standards, have increased. For example, new environmental regulations have necessitated the addition of engineering and design elements to address requirements pertaining to stormwater management under the National Pollution Discharge Elimination System (NPDES). More recently, Midpen has begun to incorporate transportation demand management (TDM) strategies into parking area designs by including new elements such as carpool lots and real-time parking information systems to manage parking demand. These various factors and requirements have affected the aesthetics of Midpen parking areas and have raised the Board of Directors' (Board) interest in defining these Staging/Parking Area and Trailhead Design Guidelines ***to ensure that new and future parking designs incorporate a natural and/or rural open space character reflective of Midpen's values and mission while meeting the practical requirements of visitor parking.***

Midpen's parking areas serve as transistional experiences for visitors as they move from the outside context to the unique preserve environments.

Midpen's parking areas are the public's first interface with *opportunities for ecologically sensitive enjoyment and education* in Midpen's preserves. Parking areas also present a challenge between the practicalities and needs of vehicle-based public access and the desire to promote the environmental sensitivities inherent in preserving, protecting, and restoring natural and agricultural lands. With thoughtful and purposeful design, parking areas can successfully highlight Midpen's mission and values while meeting the technical and regulatory requirements of visitor parking.

MIDPEN PUBLIC ACCESS PLANNING PROCESS

Similar to other work undertaken by Midpen, the development of new public access facilities is consistent with Midpen's foundational *Basic Policy*[7] which guides the provision of public access to open space lands for ecologically sensitive and low-intensity recreational uses and upholds Midpen's commitment to maximize open space preservation and resource protection efforts. Additionally, the design of these facilities is guided by other Board approved policies and planning documents that include Resource Management Policies, Service Plan for the San Mateo Coastside Protection Area[6], Open Space Use and Management Planning Process Policy[7], Improvements on District Lands Policy[8], Good Neighbor Policy[9] and others.

From the onset of a public access project, Midpen applies the Board-approved Open Space Use and Management Planning Process[2], which states:

> *"[Midpen] lands are managed to promote the continued preservation of their natural, historical and cultural resources, and at the same time provide compatible public recreation, environmental education, and agricultural use where possible." The policy further states "…the [planning] process encompasses an ongoing comprehensive approach to management, designed to respond to the dynamic changes of the District's environmental resources and public needs."*

Prior to initiating design of a parking and trailhead staging area, Midpen conducts a site planning process to select and evaluate a "contextually and environmentally appropriate" location. As mentioned in the Basic Policy, the site planning process considers a variety of factors, including but not limited to topography, geologic features, hydrology, soils, vegetation, natural resources such as biological, cultural, tribal cultural and historic resources, climate and adjacent land uses of the site. The goal of site planning is to create an ecologically sensitive development footprint that avoids and minimizes impacts on the natural environment while optimizing the aesthetic values of the site and surrounding natural setting.

USING THE GUIDELINES

The Midpen Staging/Parking Area and Trailhead Design Guidelines (Guidelines) are in alignment with and complement existing Midpen policies and guidelines that guide public access projects. The Guidelines focus on providing a framework for ensuring appropriate open space and natural/rural aesthetic character and design elements are integrated into Midpen preserve parking and trailhead staging area. These Guidelines are intended to apply throughout the design process—during the conceptual site location feasibility study phase and throughout the development of design and construction plans. They provide a shared understanding of Midpen's expectations to staff and design consultants. They also serve as a tool for the Board to use in evaluating and approving proposed parking area design plans.

The Midpen Parking Area Design Guidelines are a framework to guide the design and evaluation of new parking area projects.

The Guidelines comprise the following sections, which work together to support the development of parking area designs reflective of the sense of place in alignment with Midpen's mission and identity:

- **Values:** Expresses Midpen's values in relation to parking area design, these guidelines knit together ecologically and biologically sensitive public access with the functional requirements of parking.
- **Approach:** Describes a design approach that respects and complements the land's physical, visual, and cultural integrity, these guidelines highlight a sense of place.
- **Elements:** Describes a set of guidelines for the design of parking area elements, ensuring a consistent visitor experience across Midpen preserves.

The Staging/Parking Area and Trailhead Design Guidelines are intended to be referenced and integrated in every phase of the design process, where changes can take place throughout design, construction, and in the long-term upkeep and maintenance of a facility, with greater focus on guidelines most relevant to the work at hand. The quick reference guide below provides an overview of the use of the guidelines, with the following sections outlining more detailed considerations for each phase.

Using the Guidelines—Quick Reference

	Guideline Section		
Phase	**Values**	**Approach**	**Elements**
Planning/ Feasibility	✓	✓	
Conceptual Design	✓	✓	
Schematic Design	✓	✓	✓
Design Development	✓	✓	✓
Construction Documentation	✓	✓	✓
Construction	✓	✓	✓
Maintenance	✓	✓	✓

PLANNING/FEASIBILITY

Midpen planning work sets the foundation for evaluating the feasibility of the parking area site location and programmatic objectives. The site's context, opportunities and constraints are evaluated and considered, as well as any impact avoidance options and mitigation measures and anticipated trade-offs when avoidance is not feasible. Public input is gathered to inform programming, feasibility of the site locations and planning decisions. A range of early alternatives are evaluated and refined by staff and/or consultants, where the Guidelines will be referenced during this phase. Then a series of acceptable alternatives with a range of programming are presented to the Board, often with a preferred alternative presented at that time for their consideration and confirmation.

Integrating the Staging/Parking Area and Trailhead Design Guidelines

- Include the Staging/Parking Area and Trailhead Design Guidelines by attachment or by reference in all Consultant RFPs and RFQs.
- District staff and the Board test consultant design work against the Values, Approach, and Element guidelines prior to approval.

DESIGN

Midpen utilizes two design approaches—either Midpen Planning staff work with Midpen Engineering & Construction (EC) staff or Midpen Planning staff work with an outside design and engineering consultant. In both approaches, the Planning & Design team work collaboratively. Site meetings and reconnaissance build a common understanding of the landscape and early design ideas get tested collectively.

Conceptual design explorations tease out the overlay of the program, considering opportunities and constraints of the site. Initial program assumptions may be revisited if the site is not capable of appropriately accommodating Midpen's program. Iterative designs flesh out alternatives, which are tested against the project objectives, the Guidelines, and other policies.

Constructability, cost estimating, and value engineering test the preferred alternative's capability to advance or challenge the design team to search for refinement to the preferred alternative or new alternatives with more potential for success. Once a preferred alternative is refined and approved, significant design work is completed. However, as the design process continues through design development, the Planning & Design team should continue to evaluate decisions against project objectives, Guidelines, and other applicable policies.

Good design does not rely on particular materials or budgets, but rather on the quality of the design rationale and its response to the project's goals, objectives, and program.

Integrating the Staging/Parking Area and Trailhead Design Guidelines

- Include the Staging/Parking Area and Trailhead Design Guidelines by attachment or by reference in all Consultant RFPs and RFQs.
- Once a design consultant is retained, Midpen works with the Consultant to develop and implement an iterative design process that includes Board review and public input to fulfill the Board-approved project objectives. Midpen and the consultant would apply the Guidelines and other applicable policies to attain a design that adheres to the Values, Approach and Element guidelines while also meeting an expected level of durability, working within a Board-approved budget for long term sustainability.
- As design progresses, the Planning & Design team communicates application of the Values and Approach guidelines in conceptual design development and the application of the Elements Guidelines in development of alternatives and refinement of the preferred alternative.

CONSTRUCTION DOCUMENTATION AND CONSTRUCTION

Midpen's rigorous design process, including adherence to these Guidelines and best practices and environmental protection guidelines, as applicable, ensures that projects enter the Construction Documentation (CD) phase with a design that has been vetted by the Planning & Design team and the Board. It is critical to ensure that the essential project design is fixed as it enters this phase. However, new opportunities and constraints may arise, resulting in changes to the design. If significant revisions are required, they should be vetted against the Guidelines.

There are many important facets of the CD phase. Two are highlighted here: Cost Estimating and Materials. These two facets work in concert through the CD phase design and cost estimating processes. As budgetary concerns inevitably arise, the Planning & Design team should evaluate revisions to the design and its materials against the Values, Approach, and Elements guidelines for both function and aesthetics.

Construction is the culmination of the design and changes to the design will inevitably occur during this phase. The Planning & Design team are encouraged through these Guidelines to take positive advantage of opportunities and constraints which arise and improve on the design. Again, when consequential decisions are required, revisiting the Guidelines can support decision-making in alignment with the project's design rationale.

Integrating the Staging/Parking Area and Trailhead Design Guidelines

- Iteratively re-evaluate the evolving design per District Program, Resource Management Policies, Environmental Protection Guidelines, Design Guidelines, and Preliminary Design ideas. The Planning & Design team should circle back on design decisions to ensure project objectives and mitigation measures are being met.

MAINTENANCE AND OPERATIONS

Maintenance is key to the longevity of the parking area. Minimizing maintenance requirements reduces environmental impacts—the longer a parking area can remain in good repair without having to be rebuilt, the more environmentally sustainable it is. Design of the parking area should adhere to the Values, Approach and Elements Goals and fulfill Midpen's Mission in resource and environmental protection while considering the maintainability and financial sustainability throughout the design phases.

Integrating the Staging/Parking Area and Trailhead Design Guidelines

- Lessons-learned during on-going maintenance and operations activities are incorporated into future updates to the Staging/Parking Area and Trailhead Design Guidelines, which is subject to Board review.

A LIVING DOCUMENT

The Midpen Staging/Parking Area and Trailhead Design Guidelines is a living document to be updated as the guidelines are tested against projects with a range of sizes, sensitivities, and budgets. Updates and revisions that may challenge the Values, Approach and Elements of the Guidelines as initially established will be reviewed and approved by the Board. Lessons-learned from maintenance and operation of Midpen's parking areas, as well as monitoring of parking area impacts on the natural environment, should also inform future updates.

The Guidelines' focus is on the creation of a sense of place, recognizing that this aesthetic design goal is founded on a series of factors and decisions that occur prior to the initiation of planning or design. With increased visitation, Midpen's parking areas may need to increase in size, number, and intensity of use. While the minimalist design approach that Midpen has historically used is still appropriate in some locations, it has become less functional, and costly to maintain at other sites. The Midpen Board and staff will need to consider the desired balance among resources protection, aesthetic, visitor experience, public safety, up-front construction costs, and longer-term maintenance requirements consistent with its mission, overarching Basic Policy and other Board-approved policy and guidelines. On a project-by-project basis, Planning & Design teams should also weigh the site conditions, environmental context, and level of anticipated use with the visitor experience and benefits. Midpen's careful and thoughtful consideration of the Project's goals, anticipated trade-offs and how Midpen fulfills its Mission informs the use of the Design Guidelines and will shape future updates to this document.

A. VALUES

Built from Midpen's missions, goals, and policies, the Parking Area Values (Values) set the design attitude that underpins all programming and design decisions. The values are intended to be used as high-level criteria for evaluating whether site selection and design choices support Midpen's mission. The following values apply to the design of all parking areas, in all environmental settings and using different design elements and features as outlined in this document.

- **Respect the Natural Landscape and Cultural Setting.** Avoid or limit ecological and biological impacts by focusing on opportunities to utilize principles and methods of land preservation, restoration, and the appreciation of natural and/or rural landscapes while working with the requirements that vehicle-based public access present. Utilize aesthetically appropriate design elements to reflect and complement the surrounding environment.
- **Establish a transition zone.** Place and design parking areas that harmonize with the natural surroundings. Parking areas serve as transitional spaces into the natural environment. Minimize the visual and aesthetic/sensory impacts of parking areas on the land. Design parking areas and trailheads to be visual gateways to the open space preserve that help transition visitors into the natural/rural environment.
- **Exhibit a Sense of Place.** Express a consistent District design ethos across all preserves while highlighting local, environmental, and cultural context and the natural/rural aesthetic character of the preserve and setting. Parking area and trailhead design serves to provide visitors with a visual/experiential understanding of Midpen's values and mission. Seek opportunities to celebrate the unique attributes of the preserve.
- **Address Sustainable Practices.** Design using environmentally sustainable materials, colors, textures and construction practices that reflect and are compatible with the natural setting. Consider financial and staff resource impacts in design choices. Consider durable, low-maintenance design elements to minimize long-term maintenance requirements that complement the Design Guidelines' Values, Approach and Elements statements.

Values set the design attitude that underpins all programming and design decisions.

Values are used as high-level criteria for evaluating whether design choices support Midpen's mission.

Values apply to the design of all parking areas, regardless of envionment and the specific design elements.

B. APPROACH

An intentional design approach for Midpen parking areas is necessary to ensure an ecologically sensitive aesthetic that establishes a sense of place while meeting the technical and regulatory requirements of these facilities. The Approach Guidelines provide guidance in the design process, establishing an underlying design rationale that supports Midpen's missions, values, and policies. These guidelines are intended to be used throughout the planning, design, and construction phases to guide development and the evaluation of design decisions.

The Approach Guidelines provide a consistent design rationale across Midpen projects to support the expression of authentic sense of place for each site.

A collaborative approach to parking area design strives to integrate the knowledge and expertise of the Planning & Design team with the Design Guidelines to facilitate a clear understanding of each project site's programming potential related to parking and public access while guiding site designs that meet Midpen's mission and values. A collaborative and integrated design process is grounded in these design principles:

- Embrace Midpen's mission, values, and standards.
- Investigate, uncover and highlight the site's sense of place.
- Embed Midpen's natural resource management and operations and maintenance policies and practices into the design process.
- Understand site programming and balance it with the site's opportunities and constraints.
- Establish the project's landscape architectural design to subsequently guide the necessary engineering elements.

TYPOLOGIES

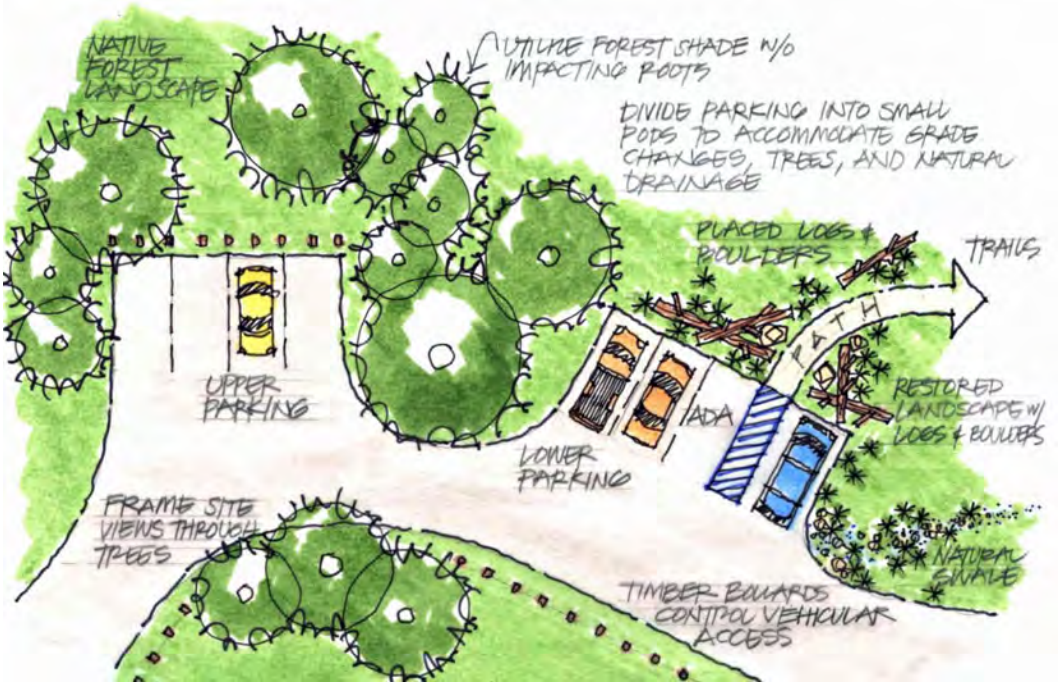
Midpen preserves span east-west across the Peninsula, encompass lands on both the Pacific Coast and San Francisco Bay and include a rich variety of natural ecosystems, cultural landscapes, and working agricultural settings. Development within these ecologically diverse and sensitive settings challenges designers to design parking areas that respect and complement the land's physical, visual, and cultural integrity. Typologies describe general groupings of landscape and cultural character. Typologies are used in the Guidelines to identify general characteristics of preserve landscape types and to create a system for understanding appropriate design considerations to be assessed within each context. They outline design ideas that should be considered to ensure that design respects and complements the land's physical, visual, and cultural integrity.

Typologies are not mutually exclusive. A single parking area may sit within a context that is both coastal and agricultural.

Where multiple typologies apply, the proposed design should be assessed against the design considerations of all applicable typologies.

Typologies are not mutually exclusive. A single parking area may sit within a context that is both coastal and agricultural. Where multiple typologies apply, the proposed design should be assessed against the design considerations of all applicable typologies.

FORESTED SITES



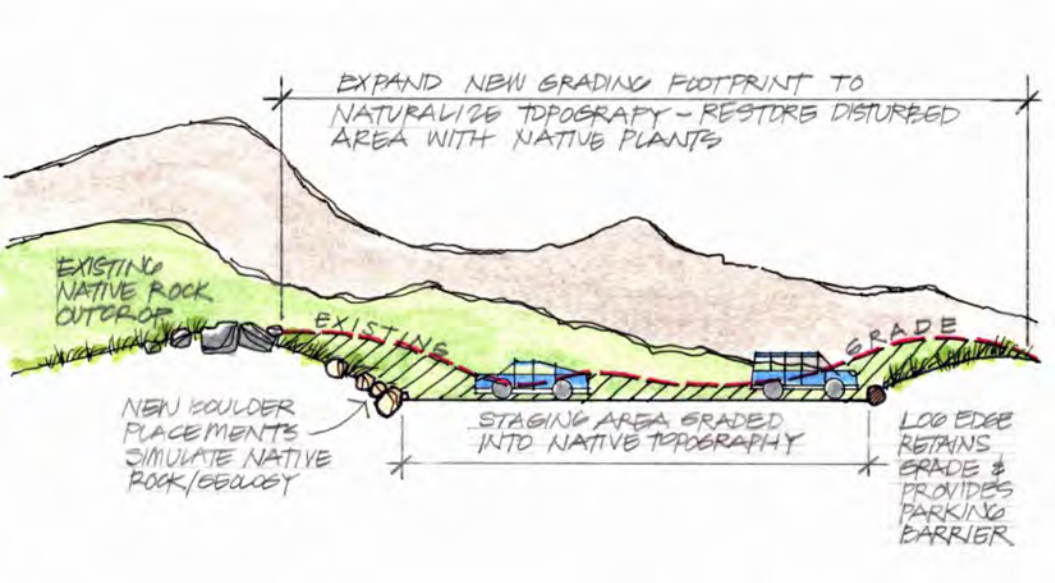
1. Forested Site Parking Area Design Considerations

Midpen preserves include a wide variety of forest types. This typology is intended to cover all types of forest, recognizing that these ecosystems share characteristics—enclosed, shady, sheltered from the wind. Forests typically provide opportunities to screen views of the parking area from inside the preserve, with varying levels of opportunity to capture views outward. Key challenges shaping parking area design in forested areas include minimizing impacts to existing trees while creating defensibility from fire. In forested site contexts, consider the following guidelines:

- Areas in which forest health has been impacted by human disturbances, such as areas with invasive plant species and compacted soils from old infrastructure, require greater resources to enhance the forest. These sites should be considered before locating site development in other forest sites.
- Consider the tree removal requirements for creating fire breaks when selecting parking areas and laying out parking on a site. Avoid and/or minimize tree removal of native trees greater than 24 inches at breast height.
- Consider breaking parking areas into smaller pods to minimize impacts to existing trees and habitat and design parking around groupings of trees to retain larger, native trees intact thus minimizing ecological and biological disturbance.

- Ensure that forest soils can sustain compactions and/or paving related to new parking areas. To the extent practicable, limit excavation and importation of engineered fill or structural measures to support parking development.
- Consider framing views through trees both into and out of the parking areas.
- Where possible, design trail connections from parking area trailheads to interior trails in a meandering manner that naturalistically follows tree groupings and other forest features, celebrating the natural characteristics of the landscape.
- Restrict construction within the tree canopy and root structure of trees.
- Trees which remain should be protected in a structurally secure and appropriate manner. The safety of parking area users with regards to potential future tree and limb fall should be considered.
- Balance the need to remove trees for parking facilities with the need to screen parking and resource protection and management goals.
- Tree removal and pruning should be done by skilled arborists under Midpen observation, during the correct season to prevent spreading of disease and pests and to avoid disturbances of nesting birds, etc.
- Utilize existing trees to shade vehicles and visitors where feasible without damaging root systems or creating tree fall safety concerns. Trees that provide shade in parking areas can improve the visitor experience by keeping these areas cooler during hotter weather.
- Repurpose downed tree trunks as placed logs for habitat structures and to re-naturalize disturbed sites within their native watershed.
- Use tree trunks and cut trunk rounds as site furnishings—seating, barriers and bollards, and edging—within their native watershed.
- For site furnishings and finishes, use dark natural colors and native textures to the greatest extent possible, including redwood and Douglas fir materials, logs, and duff.

OPEN SITES



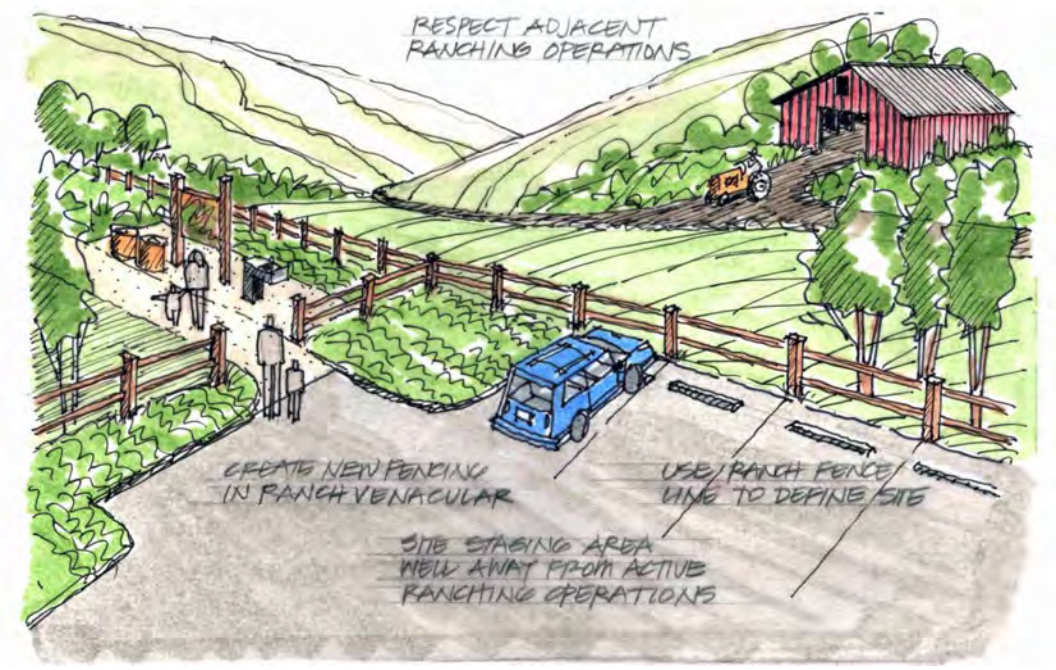
2. Open Site Parking Area Design Considerations

The open sites typology includes several ecosystems: grasslands, chaparral, coast, and bay lands. These ecosystems share many characteristics—exposed, windswept, foggy, and sunny settings with low to medium height shrubs or grasses. Trees are typically limited. These typically exposed landscapes have high visual sensitivity and little to no shade. These settings require special care in siting and grading to screen views of parking areas from adjacent land-uses, roadways, and trails. In open site contexts, consider the following guidelines:

- Use topography, grading, and road and parking alignment to screen parking in strictly grassland landscapes. Use grading sparingly in favor of other design considerations. Avoiding introducing trees within open grasslands is important to retain the integrity of open grassland views. In both chaparral and oak woodland settings, shrubs and trees may be considered for screens that mimic the distribution of the existing native vegetation. In other locations, seek topographic or geologic features, such as rock outcroppings, to shield parking from view and integrate it into native landforms. Nestle parking and roads down into existing contours and landscape. Avoid siting on visually exposed ridge lines.
- Grasslands are particularly vulnerable and have decreased in area compared to other habitat types in the Peninsula Watershed. Avoid fragmenting to minimize habitat loss.

- Take particular care in designing pathways for movement and circulation — providing pathways that offer visual interest and pathways that allow visitors to arrive at desired destination points. Grasslands are particularly vulnerable to pedestrian and cyclist access off trails. Where necessary use subtle barrier strategies to guide pedestrian and cyclist access to avoid the creation of informal pathways that damage the resources.
- Take advantage of native topography to lay out parking without creating unnatural topographic grading or over-steepened berms. Where significant cut or fill slopes appear required, consider increasing the scope of grading to allow designers to blend new parking grades into the native topography in a naturalistic manner.
- Explore use of natural low stone, rusticated poured-in place concrete or dry stack natural boulder walls consistent with the terrain, where appropriate and advantageous, to grade parking features into the existing topography and screen it from adjacent area and viewsheds.
- Avoid adding non-essential perching features such as fences, shelters, or posts which give raptors an unnatural hunting advantage.

AGRICULTURAL SITES

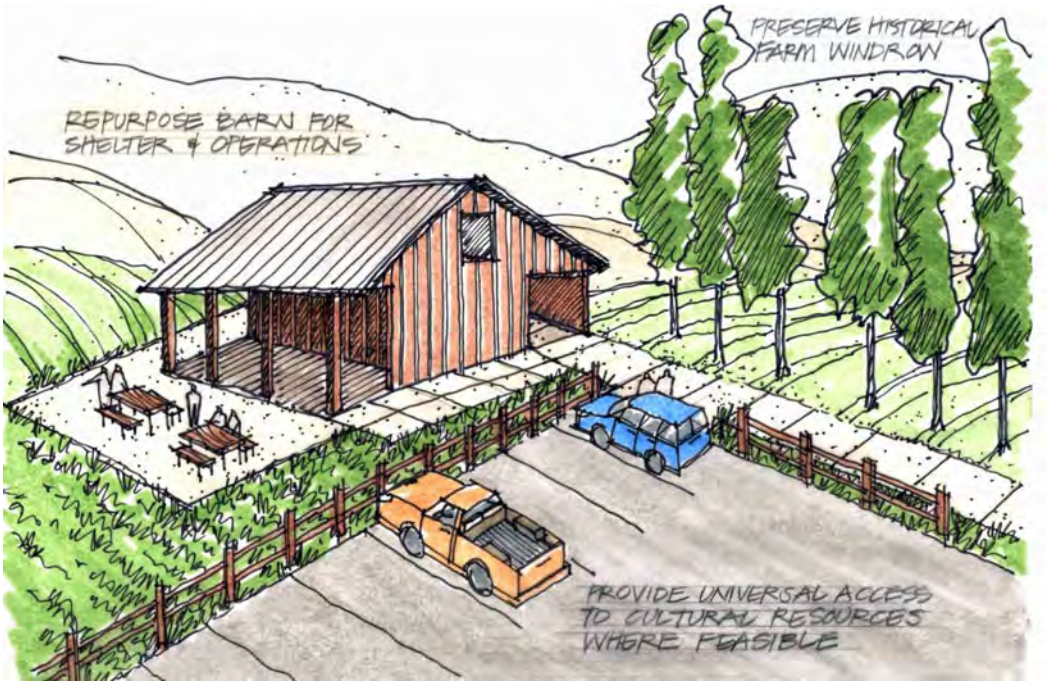


3. Agricultural Site Parking Area Design Considerations

With the expansion of Midpen's boundaries to include the San Mateo County coast, working agricultural lands are now included in Midpen's preserves. In these areas, Midpen's mission includes preserving and fostering existing and potential agricultural operations. Where parking areas are sited in the vicinity of agricultural operations, care must be taken to minimize conflicts with existing operations and impacts to lands suitable for agricultural production. In agricultural site contexts, consider the following guidelines:

- Consult with adjacent agricultural landowners and lease-holders to ensure that the proposed parking access and programming are compatible with on-going farming and ranching operations.
- Ensure that working farms and ranches maintain their use footprint, access roads, corrals, fencing, and structures and that new parking and access does not hinder agricultural operations.
- Work with the site plan of working farms to maintain or improve functionality, legibility, and aesthetics, while supporting opportunities for interpretation.
- Preserve, protect, and enhance scenic viewsheds both to and from agricultural settings.
- Evaluate how agricultural infrastructure may also be used in an aesthetic way. Consider both built infrastructure and remnant historic site features, such as agricultural rural-style fencing, gates, and siloes to help identify the agricultural setting, as well as natural infrastructure such as hedgerows.

CULTURAL SITES



4. Cultural Site Parking Area Design Considerations

The Cultural Typology applies to Midpen lands, which have been touched by history. First by Indigenous people and later by European settlers. These lands have a special place in Midpen as they offer us a physical connection to our past.

Cultural resources range in type from historical artifacts to fallow agricultural settings and remnant structures of former ranches and farms. Additionally, tribal cultural resources may also be found in these sites, where they would require protection and consultation with the indigenous tribes. This condition makes them inherently sensitive to visitation. These landscapes have high visual sensitivity. Designing in this typology requires a high level of site and historical understanding and sensitivity.

In cultural site contexts, consider the following guidelines:

- Investigate the Cultural Resource data and consult with tribal representatives when considering development in areas culturally significant to tribes within Midpen's jurisdictional boundary.
- In consultation with the tribes, develop and implement measures to avoid impacts to and protect tribal cultural resources in high sensitivity areas.
- Retain key elements of the cultural "footprints" of historical activities and/or reflect the cultural history in the construction materials used.
- Minimize subsurface grading and disturbance to preserve archeological resources.
- If onsite archeological or cultural resources are deemed appropriate for visitor access, consider locating sensitively designed parking areas to provide universal accessibility to the resources.
- Protect views to, and from, cultural/historic resources.
- Consider adaptive reuse of unused existing features, such as locating parking accessible to a formerly used barn or outbuilding. If existing buildings have cultural value but are not used in agricultural operations, consider utilizing these structures as sites for new maintenance, storage, signage, and restroom programming.
- Plan for and accommodate setbacks from scenic corridors and historic resources.
- Restrooms and other accessory structures for new parking areas should echo the design vocabulary of extant buildings.
- Existing features should be utilized to facilitate efficient movement through the site by both visiting vehicles and pedestrians.
- Limit new planting. When deemed necessary, use locally-native species in layouts that reflect historically significant plantings such as vernacular wind breaks, and farmyard shade trees. Review Resource Management Policy documents for specific recommendations.

INCLUSIVE DESIGN

In upholding its commitment to provide opportunities for ecologically sensitive public enjoyment and education, Midpen strives to ensure that these opportunities are accessible to people with a wide range of lived experiences. Recognizing that everyone navigates differently, parking areas should be designed to be inclusive, minimizing barriers to people with a range of physical, intellectual, cultural, and linguistic perspectives. In addition, observe the following guidelines:

- Design paths of travel for all users, regardless of physical, cognitive, or mental ability, rather than providing separate routes.
- Consider legibility in designing circulation patterns and locating site features such as restrooms and trailheads. Visitors with a wide range of abilities and perspectives should be able to understand how to move through the site.
- Meet or exceed all applicable codes for accessibility, including signage, pavement surfacing, slopes, and site amenities. Identify supporting elements that are not specifically required by codes (i.e. sign post material) and consider alternatives for these elements that satisfy the design guidelines.
- All site features and functions should be adjacent to ADA parking to reduce the need for lengthy accessible routes of travel, ramps and sloped walks.
- Accessible path of travel should be included in all parking and trailhead areas. Provide access to viewpoints, restrooms, signage, and trails (where feasible).
- Provide all weather surfacing in pavement or engineer and stabilize aggregate surface for the complete ADA path of travel.

VIEWSHEDS

Framing views into the preserve is key to designing parking areas that establish a sense of place. Views illuminate the special landscape characteristics of the immediate project site and the distant landscape context. Screening views of functional parking area elements also supports a sense of place and the visitor experience. Consider the following guidelines:

- Capture views of topography, geology, vegetation, water, and sky.
- Highlight special natural and cultural site features, such as rock outcroppings, iconic or significant trees, orchards, corrals, agricultural buildings, residences and accessory structures or bridges, all of which identify a sense of place.
- Parking areas should be screened from Scenic Corridors. Respect the visual intrusion of the parking area or viewpoint on adjacent and distant lands within the project viewshed.
- If the parking area can also serve as a viewpoint, take advantage of that opportunity, and combine both functions into the parking area.
- If a viewpoint is separated from the parking/trailhead area, ensure legible and universal access between parking and viewpoint. Strive to access the viewpoint from the trail or from the entry road (as a pull-out).

- Consider short duration stopping for visitors at viewpoints and avoid creating long-term parking stalls.
- When appropriate, provide wayfinding and interpretive/educational exhibits at the viewpoints to enhance user understanding of the landscape character, ecology, and history.

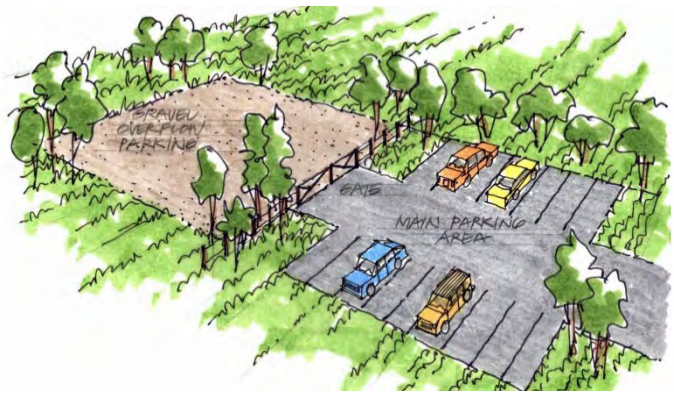
SITING AND LAYOUT

Midpen locates parking areas to minimize impacts while achieving programmatic needs. Parking layouts should also be driven by site opportunities and constraints rather than programmatic needs alone. Development of parking areas that exhibit a sense of place in alignment with Midpen's missions requires exploration of creative parking layouts which are visually and environmentally sensitive to the preserve's natural resources. Observe the following guidelines:

- Consider siting parking areas on the outer edges of preserves and close to areas of existing circulation and/or development such as access roads, highways, property lines to non-open space lands.
- Efficient parking layouts should be pursued to the extent feasible, but not as a matter of course nor to the detriment of the natural resources.
- Consider breaking single large parking areas into smaller, discrete clusters to screen parking, accommodate topographic variation, natural features, native vegetation and drainage.
- Consider breaking up parking into daily core area and special event overflow areas where practicable.
- One-way and two-way parking layouts should be explored along with 90 degree and angled parking stall configurations.
- Parking stall counts and layouts shall meet or exceed regulatory requirements for ADA van stalls and ADA stalls.
- Ensure accessible path of travel is included in all parking areas, linking ADA stalls to trailheads, viewpoints, restrooms, and site features.
- Separate pedestrian path of travel from circulation for automobiles if feasible.
- Consider phased implementation of parking pods to allow for near-term flexibility and to accommodate unforeseen future pressures on parking demand.



5. Integrate parking areas into site context.



6. Consider the use of parking pods for overflow areas and to accommodate future phases of construction.

TURNAROUND/DROP-OFF, EMERGENCY VEHICLE AND TRANSIT

- Parking layouts should strive for easy drive-through and exit, especially where heavy parking demand necessitates queuing for parking.
- Provide turnarounds or drive through layouts for Emergency Vehicle (Fire and Medical) access to parking and trailheads.
- Turnarounds enhance parking circulation, queuing, and drop-off functions, including transit and ADA parking. Dead-end parking layouts should be avoided whenever feasible.
- Pedestrian and ADA drop-off areas should be considered in all parking area layouts. Consider transit drop-off areas as appropriate. Drop off areas should be located adjacent to ADA parking and trailhead staging areas.

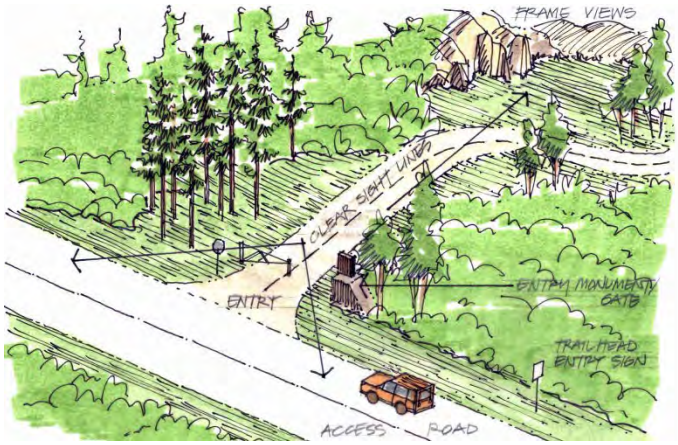
EQUESTRIAN PARKING

- When provided, equestrian trailer parking shall meet current accepted standards for layout, stall size, and orientation. Consultation with local equestrian groups is strongly encouraged. For example, equestrians prefer to ride in pairs or groups, such that there should be minimum of two trailer parking spaces rather than only one trailer space.
- Provide pull-through parking layouts wherever feasible. Only in constrained site should parallel or reverse parking stalls be considered. Equine parking requires more space than vehicular parking and may not be suitable for all parking areas.
- Separate equestrian parking from parking and circulation for automobile, pedestrian, and bicycle users when feasible.
- Equestrian parking shall include consideration of the transporting and handling of horses and ensure ample space is provided for each truck and trailer. Design should accommodate at minimum a 50-foot truck and trailer with room to off load and tie horses. Horse tie up can be to the side if there is no fencing alongside exterior parking spaces. While the standard minimum width for equestrian spaces is 16 feet, consider providing 18-foot wide spaces, where feasible, to allow the flexibility to re-stripe as standard vehicle spaces if needs change.
- Provide separate equestrian trail route between equestrian parking and the multi-use trail system to the extent feasible. Consider equine-friendly surfacing materials for parking and trail routes. Minimize the use of vertical curbs at edges.

ENTRY ROADS

The entry road experience should immerse the visitor in the native landscape, creating a procession from the public access road to the parking area that complements the surrounding preserve and is safe, intuitive, and functional. Observe the following guidelines:

- Align and grade the entry road into the landscape to achieve a harmonious connection between the entry road and the natural topography and vegetation.
- Preserve native vegetation, and topographic features of interest, especially mature native trees.
- Avoid significant cut and fill slopes unless restoration to natural-looking contours and vegetation can be achieved.



7. Design to immerse the visitor in the natural landscape.

- Consider siting entry roads on the outer edges of preserves and close to areas of existing circulation and development, such as access roads, highways, property lines to non-open space lands.
- Use appropriate entry markers that are visible from the entry road to identify entry/exit points and wayfinding.
- Follow best practices for pedestrian, bicyclists, and driver safety, including ensuring adequate line-of-sight and advanced driveway approach warning signs.

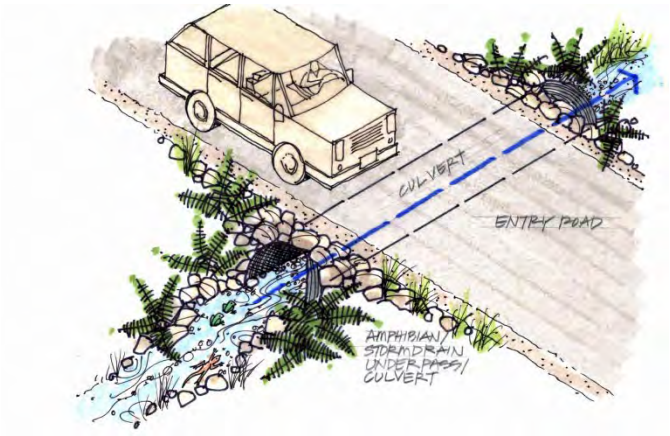
TRAILHEADS

Parking area design should consider trailheads as an integral element of parking and circulation design. Observe the following guidelines:

- Provide a gathering area at the trailhead which is off set from the trail and provides a staging area for individuals and groups. Where anticipated visitation levels warrant, provide restrooms, seating, bike racks, and boot brushes. Provide bike brushes where bikes are allowed and dog waste receptacles at trailheads where on-leash dogs are permitted.
- Display signage for trail wayfinding, interpretation, and regulatory notices.
- Design pathway to accommodate hikers, runners, cyclists, and equestrians as appropriate and consistent with the Trail Use Guidelines.[10] Pathway edging should be limited to sustainable materials, wood, timbers, placed logs, weathered steel, and stone.

HABITAT CONNECTIVITY

Entry roads and parking areas should be sited and designed to consider wildlife movement and safety as well as ecologically and biologically sensitive areas. In addition to routing entry roads and siting parking along preserve edges rather than bisecting habitat lands and laying out shorter entry roads to keep vehicle and parking impacts closer to existing access roads and highways, consider the following guidelines:



8. Design to reduce impacts to wildlife.

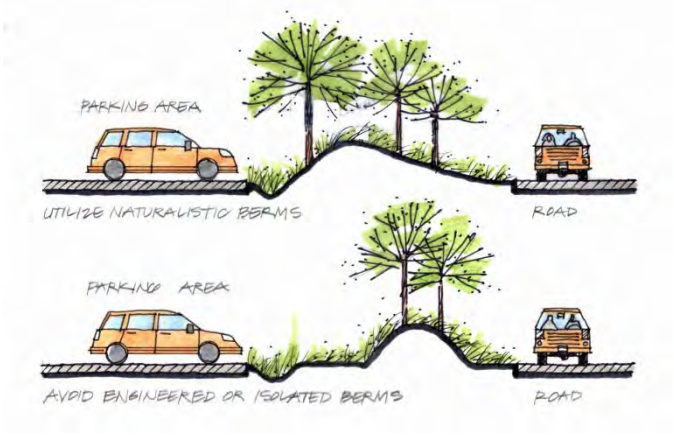
- Utilize wildlife-friendly fencing for migration routes and movement. Consider use of non-permeable or directional fencing where appropriate to minimize conflicts between vehicles and wildlife.
- Create culvert crossings for small mammals and amphibians, and avoid interrupting habitat connectivity where appropriate. Ensure that usability and maintenance are considered in the design.
- Utilize wheel stops with gaps to allow for newt movement across paved areas.

GRADING

Due to the preserves' visual and ecological sensitivity, proper grading is critical to developing parking areas that align with Midpen's vision, avoiding an overly engineered or urban character. Prior to designing the preliminary grading plan, carefully select a relatively flat site that requires the least amount of grading. Then identify significant natural site features: small cliffs, rock outcrops, mature trees, gnarled snag or trunk, swale, or cultural features, which should be preserved and highlighted. Grading plans, from the conceptual design stage through to construction, should observe the following guidelines:

- Respect the natural topography of the site, working with topography to the extent feasible.
- Locate parking in areas with soils and drainage which are advantageous to parking area development and that avoid or minimize impacts to the natural setting, biological and cultural resources, etc. Avoid poorly drained or erodible soils or bedrock that would create construction challenges and expenses. Avoid slopes that exceed the soil type's maximum angle of repose to avoid erosion, typically a maximum of 3:1 run to rise ratio.
- Minimize site impacts, overall grading footprint, large and/or steep cut and fill slopes, and unnatural post-construction topographic grading conditions. Strive for a net zero cut/fill where feasible.
- Integrate grading into the native landscape character and topography. Final grading shall exhibit a naturalized condition, able to be restored to the pre-construction landscape condition.

- Where appropriate (e.g., annual grasslands) consider expanding the envelope of the topographic grading limits to re-naturalize the parking area grading back into the native topography and then restore the landscape.
- Avoid large and/or tall retaining walls or rockeries. Where necessary, consider terracing and breaking up the linear distance of walls into smaller more organic retaining structures. Where terracing is necessary, use natural rock or materials consistent with the site's current or prior uses.
- Avoid unnatural grading measures which highlight an engineered approach. Steep cut and fill slopes are problematic sites for restoration. Abrupt, awkward, and isolated "berms" of soil look unnatural in the landscape and should be avoided. Vary the shape and height of berms to achieve a more naturalistic look.



9. Create naturalistic berm forms to integrate with the surrounding landscape.

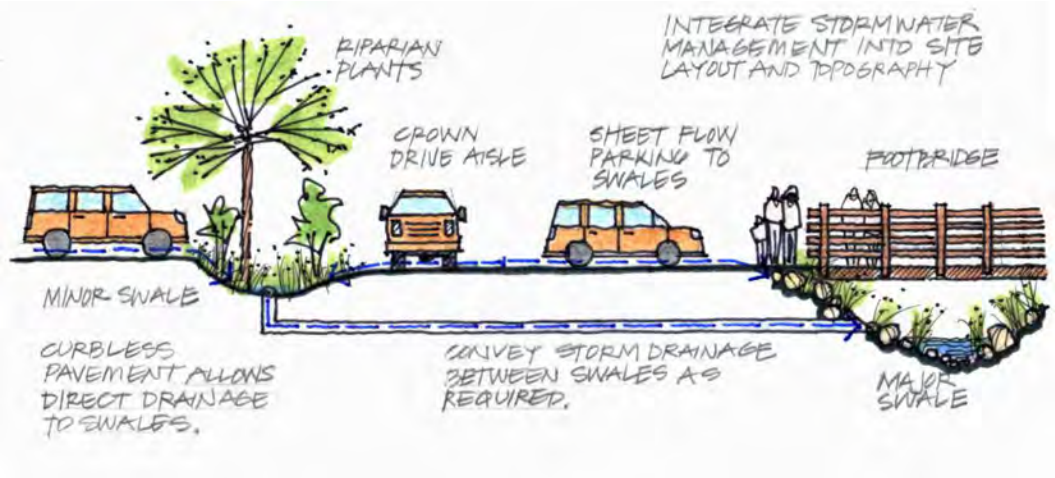
- When large cuts and fills are unavoidable, utilize walls (rustic board-formed concrete or stone), boulder outcrops, timbers, and placed logs to blend grading into the native undisturbed site condition.
- Where a significant grade change occurs, consider grading the parking into discrete terraces with native landscape or natural feature buffers between the terraces taking up the change in elevation.
- Grading should seek to minimize the project footprint while minimizing visual and environmental impacts. Where the cut and fill required to achieve a naturalistic form is large, consider reassessing site location feasibility.

DRAINAGE

Drainage should be approached as a natural occurrence integral to the site rather than a problem to be solved solely in functional and regulatory terms. Site assessment should include mapping of site drainage patterns and saturated soil areas, as well as both regulatory and non-regulatory drainage and water features such as swales, wetlands, creeks, ponds. Perform rainy season and rain event day site visits to ascertain actual site drainage patterns and implications. If rainy season reconnaissance is not feasible, rely on Midpen direction for rainy season and empirical site data. Observe the following guidelines:

- Assess subterranean drainage, springs, weeps, and saturated soils and avoid them and or plan for dewatering of site areas in parking plan.
- Provide a setback buffered with native vegetation from all creeks, ponds, and other riparian ways.
- Ensure existing and anticipated (post construction) site drainage is accommodated, and parking facilities are sited in appropriate locations and soils.

- Consider Low Impact Development (LID) measures when addressing site drainage and regulatory imperatives.
- Avoid altering or disturbing native site drainage patterns to the extent feasible. When unavoidable, ensure geomorphic analysis is completed for site to guide drainage engineering decisions.
- To the extent feasible, utilize naturalized, open swales to accommodate site drainage. Integrate swales into the overall topographic concept for the site.
- Where piped conveyance of site drainage through drain structures, culverts, and detention ponds is required, integrate catchment and conveyance systems into natural swale systems.
- Comply with applicable C.3 Stormwater measures, such as avoiding drainage and runoff into riparian ways, but do not limit stormwater design to regulatory imperatives. Ensure drainage design and C.3 compliance is integrated holistically into the parking site and landscape.



10. Integrate stormwater systems into site grading.

COLOR AND TEXTURE

The plants, rocks, and soils in Midpen's forested preserves make up a color palette of muted, olive, and dark evergreen trees and shrubs. Open grasslands morph from bright green in winter and spring to a tawny golden brown in summer and a dun color in fall. Forests of broadleaf and coniferous trees have fine to medium leaf and needle texture. Rock is typically a mottled grey-brown and can be lichen and moss covered. Soil is variable but is typically clayey. When dry it exhibits a light tone from warm grey to sienna and umber.

All elements of parking area design should harmonize with the colors, textures, and materials found in the environment surrounding the site. In addition:

- Avoid bright primary colors except as required for regulatory signage and striping for ADA parking unless regulatory exemptions are allowed.

- Complement native landscape color and texture by using native materials. When native materials are not available or feasible, use complementary imported materials (aggregate and boulders for instance) which most closely match native materials.

MATERIALS

Materials selection requires alignment of design character with the site's visual and ecological context. Balancing durability and maintenance considerations in addition to up-front and long-term cost, while a consideration, are not intended to compromise the design goals otherwise set forth in the Design Guidelines. While the appropriate balance of these elements will be determined by the parking area's specific program, the following guidelines should be considered on all sites:

- Identify and consider materials which are sustainable, durable, and environmentally responsive. Consider long-term costs and perform Life Cycle cost analyses (including maintenance and replacement) to determine which materials best suit the project.
- Identify and consider sustainable materials which can stand up to the rigors of Midpen's open space lands environments from salt spray coastal settings to exposed high elevation mountains.
- Use pressure treated wood consistent with Midpen Details and Specification Guidelines[11] and only where necessary to achieve sustainability and maintenance objectives.
- Use wood which can weather naturally, blend into the landscape, and reduce maintenance. Painted wood should be used sparingly.
- Weathering (Corten type) and galvanized steel should be used for metal elements. These materials, though fabricated, present the most authentic and natural of the metals and metal finishes. On or near saltwater shoreline environments, ensure corrosion resistant fasteners and brackets are used.
- If using man-made or machine-fabricated materials, select rusticated or matte finishes to avoid reflection and glare and to best complement the natural setting.
- Uncoated materials allowed to weather naturally are preferred. Where appropriate, durable powder coated surfaces can be considered.

VEGETATION, SOILS, AND FIRE MANAGEMENT

The vegetation in Midpen's preserves are key elements of their sense of place, as well as their ecological function and health. Parking area design should preserve and protect existing native site vegetation to the extent feasible and restore impacted areas with locally native species. Special consideration should also be given to preserving native soils and minimizing import of off-site soils as they may contain pathogens that could impact native species. The following guidelines should be considered on all sites:

- Avoid impacts to rare species habitat, including potential hydrological impacts.
- Avoid improvements or public uses on existing prime agricultural lands and Unique Farmlands or Farmlands of Statewide Importance as shown on Farmland Mapping and Monitoring Program of the California Resources Agency within the San Mateo Coastside Protection Area, as per the Service Plan (Guideline G.3.2).
- Explore parking layout alternatives that incorporate existing native vegetation.
- Restore disturbed parking area sites with locally native species. No listed invasive species shall be used at any time. Plant material brought in from the outside should be tested to ensure they do not bring pathogens or other detrimental elements into the native habitat.
- Ensure invasive species are removed from the site as part of a comprehensive vegetation management program. Manage invasive species through Midpen's existing Integrated Pest Management Program and pre and post construction mitigation measures.
- All infrastructure should avoid special soils, such as serpentine.
- Balance screening the visual impact of parking areas with the need to ensure public safety through sightlines, defensible space, and fire wise practices.
- Soils shall be limited to on-site soils carefully stockpiled and screened for re-use on-site.
- Avoid the importation of soils (other than engineered fill). If deemed necessary, imported soils shall be procured in a manner to limit the risk of invasive species and pathogens.
- Only certified weed-free straw shall be used. Mulch produced on site may be used.
- Consider tree fall safety when preserving existing trees or planting new trees in areas being restored.
- Integrate standardized and Midpen-adopted Fire Management Strategies and Fire Wise Vegetation Management into the parking area layout, planting, and maintenance program.

C. ELEMENTS

Design Element guidelines shape decisions at the core of the design process. While these guidelines generally apply to the design of all parking areas, regardless of typology, the specific project program will determine which design elements should be considered. At project initiation, an assessment of the relevant design elements should be performed. This assessment should be revisited at key design milestones to ensure that all relevant guidelines are being considered.

General Guidelines shape design decisions at every step of the process.

General Guidelines apply to the design of all parking areas, regardless of environment.

SURFACING

Midpen historically installed simple parking facilities with gravel surfacing and minimal detailing. This understated approach created parking areas with a naturalistic rusticity that is visually complementary to the surrounding landscapes. Increased visitation, cost considerations and maintenance requirements have warranted consideration of a broader range of surfacing alternatives. High-use parking areas and parking areas that are close to the urban/suburban interface, may be appropriately hard paved, while for small and remote parking areas, dirt or gravel surfacing may be appropriate. Surface material selection should take into consideration Midpen's design ethos as well as site and project specific concerns such as visual, environmental, and water quality impacts, sustainability and life-cycle costs, and maintenance expectations. Rather than identifying specific surfacing recommendations, these guidelines outline considerations in the selection of the primary surfacing options.

GRAVEL

Crushed aggregate (gravel) is the common surfacing material for older Midpen parking areas, which has established Midpen's rustic, naturalistic parking design aesthetic. Gravel should continue to be considered for certain parking areas where this aesthetic is desired and the maintenance demands are accepted as one of the costs. However, gravel creates a significant maintenance burden for staff. Surface drainage, rutting and potholing are the key maintenance issues. Gravel lots require annual pothole repair, as well as re-grading, adding rock, and compacting every 1-3 years. Gravel is not an ADA accessible surface and must be combined with paved ADA stalls and route of travel to accommodate essential ADA access. The color is typically a light cool grey tone but can be specified from different quarries with slight tonal variations.

Gravel is most appropriate for smaller informal access points, as well as for "overflow parking" areas and any areas where future phased parking expansions are planned. As the base course for asphalt and concrete paving, gravel can also serve as an intermediate surfacing for any parking project where either budget or changing parking demands indicate a need for phased construction.

STABILIZED AGGREGATE

A combination of fine to medium aggregates with an environmentally-friendly stabilizing agent, stabilized aggregate paving systems can receive integral color/tone to blend this surface into diverse landscape settings. It has a high aesthetic appeal and has been used successfully in pedestrian, light service vehicle, and parking situations. Its long-term stability and durability under vehicular traffic would need to be proven prior to specifying for Midpen parking areas.

CHIP SEAL

Chip sealing is a rustic and slightly lower cost paving alternative to asphalt. It is a transitional paving treatment between gravel and asphalt. It is common in rural areas, and on lower traffic roads, but has been used on highways. Its application process can be varied depending on the subsurface and surface conditions it is being applied to but it typically involves a base layer of gravel, a secondary layer of asphalt, and finally a layer of loose aggregate. This is laid up in lifts and rolled to stabilize.

Advantages of chip seal include its rusticated look, lower cost than typical asphalt, and good traction due to rough surface texture—when swept clear of loose aggregate. It does not need asphalt sealant and the surface can be readily repaired. Disadvantages include a shorter life-span and loose aggregate that can be an issue for road cyclists.

ASPHALT

Asphalt is the standard for paved open space and trailhead parking areas. It is cost effective, relatively easy to repair, and durable over a longer term than gravel or chip seal. Asphalt is not as durable as concrete.

Though it is initially dark charcoal or black in tone, asphalt weathers to a light grey over time. Asphalt can be colored to give a more natural and neutral color. Asphalt is slightly more informal and forgiving underfoot than concrete.

CONCRETE

Concrete is a highly durable and long lasting paving alternative. Finished concrete can be perceived as a more urban material. Careful detailing and the use of rustic barriers and wheel-stops can mitigate the urban aesthetic. Concrete's neutral, light grey tone can complement natural settings, with the grey tones varying widely with

the specific mix. In addition to toning down the darkness of concrete with varying quantities of lampblack additive, concrete can be readily colored with additives.

Concrete has several advantages as a pavement. Its durability, longevity and lack of regular maintenance can be a long-term cost savings.

Concrete is, however, more expensive than asphalt, chip seal, or gravel. While maintenance is less than asphalt through its lifespan, when concrete degrades it has to be replaced or carefully resurfaced.

PERMEABLE PAVEMENTS

Asphalt and concrete are available in permeable installations, offering stormwater and water quality benefits, reducing runoff volumes and trapping sediments in the permeable pavement section. Permeable pavements can also offer aesthetic benefits. Their porous, open graded aggregate, textural surface can be perceived as more natural than traditional pavements.

Permeable pavers can be installed in the full parking area or just sections of a parking area, such as parking stalls. They can also be used to delineate parking stalls by using pavers for the parking space and a strip of concrete between the stalls to act as striping. This approach may have limited application due to cost considerations.

Permeable pavements are more expensive than traditional pavements but this additional cost may be offset by water management benefits. Cost considerations include:

- A more expensive, engineered, aggregate base course and an underdrain system. Underdrain systems may not be feasible in all Midpen locations due to the presence of clay soils or challenges in connecting to bioretention system.
- Regular maintenance requiring specialized equipment to vacuum sediment from the pavement section.

COLOR AND TEXTURE IN SURFACING

Given the dramatic natural beauty of Midpen's landscapes, it is a challenge to use artificial color and texture to harmonize paved surfaces with the landscape. Colored pavements are more appropriately used in refined, urban settings. Adding color or texture to pavements for aesthetic ends should generally be avoided in natural open space environments. Instead, use materials in their essential colors and textures.

When considering colored pavement there should be a deliberate effort to avoid creating a refined, urban finish. The goal should not be to draw attention to the paving, but instead create an elegant functional pavement and then allow it to fade into the landscape. When considering color pavement additives, it is critical to perform a complete series of alternative color and tone mock-ups on-site and at scale. Mock-ups are critical to determining if colored pavements offer the intended outcome and are consistent with the natural color palette of Midpen's landscape.

As with colored paving, smooth surfaces connote an urban sensibility. Bringing texture to paving is more challenging and expensive than color. Asphalt cannot be readily textured but concrete can to some degree. Concrete can be finished with a roughened surface which both creates an anti-skid effect and a more rustic appearance. If achieving a more rustic texture is a project goal, the only solution (beyond using gravel) may be to consider using permeable paving with its open graded aggregate texture.

In concrete, score and expansion joints can create some minor texture across large surface. In parking areas, jointing can be installed to align with and delineate stalls and drive lanes. Avoid using scoring for decorative purposes.

STRIPING

Parking stall striping is key to pedestrian safety—delineating areas reserved for cars in order to minimize conflicts between pedestrians and vehicles. While standard approaches to parking stall striping can be perceived as incompatible with the desired design character, striping is essential to efficient and safe parking areas. Standard of practice in California is a four-inch white stripe to delineate parking stalls. This practice creates visual contrast that is readily accessible to, and understood by, people of all abilities and diverse backgrounds. Use of other colors and patterns may be confusing to visitors, creating a potentially unwelcome or exclusive experience. Consider the following guidelines:

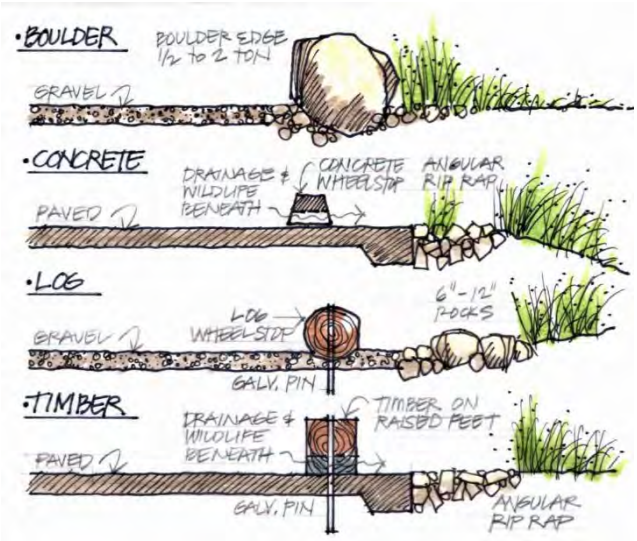
- Striping with standard traffic stripe paint is necessary to comply with uniform industry safety standards
- Use standard white and the code-required blue on ADA aisles/symbols. Avoid using red or bright yellow striping except where required to meet codes and emergency vehicle access requirements.

- Non-standard colored or patterned striping is not recommended. To achieve a more subtle striping effect, consider delaying the typical re-striping schedule and allowing striping to weather naturally.

SHOULDERS, EDGE RESTRAINTS, WHEEL STOPS

Parking area shoulders have to accommodate and address the structural integrity of pavements, pedestrian, cyclist, and equestrian use, fire safety, and maintenance. Observe the following guidelines:

- Utilize natural treatments and or materials for shoulders and edge restraints.
- Consider wheel stops in materials which complement the natural setting and meet Midpen maintenance needs.
- Wheel stops shall not hinder the movement of amphibians crossing parking areas.

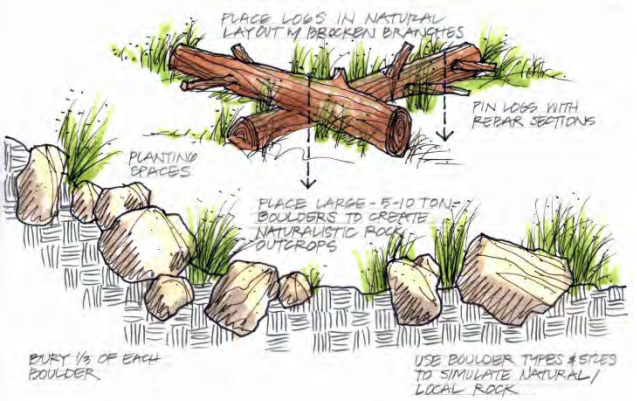


11. Utilize natural materials and treatments in wheel stops, shoulders and edge restraints.

BOULDERS, AGGREGATE, LOGS, TIMBERS

Boulders, aggregate, logs, and timbers shall be locally sourced and chosen to complement existing materials found on the site or in the regional landscape.

- Limit use of aggregate. Where used, aggregate should be locally-sourced and selected to complement tone and texture of native aggregate and boulder stone to the extent feasible.
- Select boulders either from site excavations or carefully vetted off-site locations. Ensure any imported boulders will match or complement the native rock on the site.
- Place boulders on sites which display boulders in the native landscape.
- Placed boulders should be used where appropriate to enhance grading and restoration efforts.

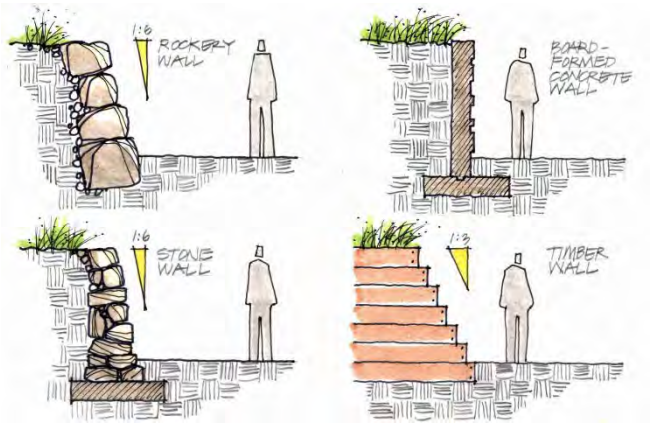


12. Use locally-sourced materials that complement material found onsite.

WALLS AND ROCKERIES

When topography and grading necessitate use of retaining walls, ensure that these features harmonize with the landscape context.

- Use natural materials and concrete.
- When using concrete provide an authentic board-formed or raw-formed concrete without sack finishing. Avoid faux finishes and coloration of concrete walls.
- Do not use segmental concrete block walls or concrete masonry unit walls.
- Stone walls can be rusticated informal dry stacked walls or outcroppings or fitted (mortared or dry stacked) stone walls or mortared veneer over concrete masonry units.



13. Design retaining walls to complement the landscape context.

- Rockeries and rock outcroppings should be used deliberately and artistically to harmonize with indigenous stone outcrops.
- Timber and log retaining should be considered where congruous with the site environment.

RESTROOMS

Parking area restrooms should be coordinated with Midpen staff to ensure compliance with standards. Where appropriate, shelters and buildings should be coordinated with restrooms to ensure all built elements are of the same or complementary architectural style, material, and color. Observe the following guidelines:

- Ensure that restrooms are functional and subservient to the landscape and are not architectural features.
- Use of stock or custom restroom units depends on site character and project programming.
- Locate restrooms for universal accessibility, user safety and observation (defensible space), legibility, and maintenance operations and access.
- Consider prevailing winds and downwind drift of vault toilet fumes. Use passively venting vault systems. Avoid active fan systems unless required.
- Do not place vault restrooms in or immediately adjacent to trailhead gathering areas where toilet odors will impact visitor experience. Provide sense of separation for restrooms, while ensuring user safety through visibility and accessibility.
- In sensitive landscape settings, consider cladding restrooms or creating custom board-form finishes, textures, on precast concrete buildings to integrate the buildings into landscape.

- Use natural concrete color or colored concrete complementary to the surrounding landscape context. Finish all surfaces with graffiti-resistant sealants or assume Midpen shall paint out graffiti with standard paint color.

FURNISHINGS

Midpen's parking areas are typically designed with modest visitor amenities. Where the program calls for elements such as bike parking, trash/recycling receptacles, dog waste stations, and drinking water, the following guidelines should be considered:

- Provide furnishings at parking areas that are appropriate to the use and access of the site.
- Ensure furnishings complement the natural surroundings of the site. In remote, rustic settings provide rustic seating of locally sourced cut logs or boulders. For more developed settings consider providing Midpen standard benches.
- Utilize stout, bold furniture elements which can stand the test of time, weather, and heavy public use with a minimum of maintenance. Avoid improper use of composite woods in furnishings.
- Use natural wood, galvanized and weathered steel, concrete, and stone for furnishings.
- Avoid painting furnishings—provide furnishings in natural finishes that are allowed to weather to a rustic patina. Where an applied finished is appropriate, use a durable powder-coated finish.
- Ensure furnishings meet the essential functional needs in an elegant and thoughtful design and layout. Avoid specifying furnishings or creating furnishing layouts which draw undue attention from the landscape.
- Include wheelchair companion seating areas per ADA at all benches and seating features.
- Provide bike brushes at trailheads and parking areas and encourage users to brush off bikes before and after their rides to discourage the transmission of invasive weedy species to Preserve landscapes.
- Bike racks should match the current Midpen standard.

BICYCLE PARKING

Bicycle parking should be considered in all preserves and designed to accommodate current levels of visitation while considering potential future expansion. Refer to the multimodal access plan, if available, to understand whether visitors are arriving at the trailhead on bicycles or arriving by car and unloading to ride out onto the trails. The provision of bicycle parking should observe the following guidelines:

- Consider designing for an initially modest level of bike parking and expand facilities if the level of use is not accommodated by the initial bike parking installation.
- Integrate bike parking into the overall site layout. Ensure cyclists have a safe, functional, and legible route from the local access road to the bike parking. Limit conflicts with other users, including hikers, equestrians, and ADA users.
- Bike parking should be located in high visibility areas that visitors and Midpen staff can surveil from patrol vehicles.
- Locate bike parking near restrooms to allow cyclists to secure bikes while using the facility.

EQUESTRIAN AMENITIES

Equestrian amenities should be considered where there is designated equestrian parking or equestrian use is common. Where amenities are to be provided, consider the following:

- Hitching post or rails should follow standard practice for equestrian staging areas. Ensure proper separation between hitching areas to avoid conflicts between equestrians and their horses.
- Mounting steps should follow standard practice for height and should be a material complementary the specific site context and conditions.
- Potable water or spigot to provide potable water may be provided without trough. Troughs are less desirable due to the difficulty of maintaining clean water.
- Reliable untreated spring water sources may be used if no potable water source is available, but they should be signed 'non-potable'.
- Provide legible, functional, and safe trail access and circulation for equestrians which limits conflicts with hikers, dogs, and cyclists.

FENCING, GATES, SCREENS, BARRIERS,

Fencing, gates, screens, and barriers should be used sparingly and strategically to achieve functional objectives not aesthetics. Where required, they should complement the landscape setting. They should be visually subservient to the landscape except in Agricultural or Cultural landscape typologies where fencing is integral to the purpose and setting.

- Provide fencing elements only when required to restrict vehicular or pedestrian traffic or for livestock or equestrian exclusion.
- Fencing elements shall consist of natural woods and metal.
- All should incorporate wildlife friendly practices and allow for movement of wildlife.

- Coordinate fencing with adjacent land-uses and owners especially where livestock are present.
- Use fencing or low restoration barriers (low post and cable) to protect new restoration areas and to guide pedestrian and cyclist circulation.
- Use boulders, monolithic timber bollards, and wood post and rail barriers to restrict vehicular, pedestrian, cyclist, and equestrian access.
- Provide appropriate deer fencing to support establishment of new plantings.
- Provide entry gates (steel, manual or automated as required) at all parking facilities.

SIGNAGE

Follow Midpen's comprehensive signage program for staging/parking and trailhead areas while addressing the particular signage needs of the individual site. Midpen's signage program includes a Sign Manual12 and a Sign Committee overseeing signage implementation. The Sign Committee is comprised of field representatives from the Skyline and Foothills field offices; staff from Public Affairs, Visitor Services' Interpretation and Education Programs, GIS; and the Sign Coordinators (from Planning). Consider the following guidelines:

- Use a minimalist approach to signage to avoid creating visual clutter that distracts from the essential character of the landscape.
- Sign frames should be considered in both metal and wood, as appropriate to complement the specific site context and conditions, in alignment with the guidance provided in the Materials guidelines.

PARKING TECHNOLOGY

Electric vehicle parking and transportation demand management (TDM) technology are evolving design elements in Midpen's parking area projects. For example, some Midpen preserves are located in Counties that require EV charging stations. Parking technology has also been identified in the Midpen Climate Action Plan as strategies for promoting green modes of transportation. Midpen will need to develop and regularly refined relevant guidelines as the technology advances and its use within the preserves is defined. Maintaining a harmonious design character is the key challenge when integrating technology developed for urban settings into the natural environment of Midpen's preserves. Minimizing visual and spatial impacts will be key.

Initial considerations include:

- Selecting compact equipment.
- Utilizing neutral colors that are compatible with the site's context. In shady sites, black or grey equipment structure may be appropriate, while tans and browns may be more appropriate in open grasslands.

- Locating public facing equipment out of scenic views and away from entry sightlines. Screen supporting equipment and installations from view.
- Where local jurisdictions may require EV parking stations, consider accommodations for locating future charging station installations, including sufficient available power or ability to provide power at a later date.
- Consider infrastructure, site layout, and other accommodations that support parking demand management solutions and/or green modes of transportation where and when appropriate.

LITERATURE CITED

1. Basic Policy
2. Resource Management Policies
3. Agriculture Policies
4. 2014 Vision Plan
5. Measure AA Priorities
6. Service Plan for the San Mateo Coastside Protection Area
7. Open Space Use and Management Planning Process Policy
8. Improvements on District Lands Policy
9. Good Neighbor Policy
10. Trail Use Guidelines
11. Details and Specifications Guidelines (Midpen internal document, available upon request)
12. Sign Manual (Midpen internal document, available upon request)

Midpeninsula Regional Open Space District | Design Consistency Checklist

Design Guidelines Consistency

Element	Description	Consistent?	Discussion (As Needed)
Values			
Respect the Natural Landscape and Cultural Setting	Avoid or limit ecological and biological impacts by focusing on opportunities to utilize principles and methods of land preservation, restoration, and the appreciation of natural and/or rural landscapes while working with the requirements that vehicle-based public access present. Utilize aesthetically appropriate design elements to reflect and complement the surrounding environment.	Yes	Situating the parking area to limit earthwork was another driving factor in the design of the parking area to minimize ecological and aesthetic impacts.
Establish a Transition Zone	Place and design parking areas that harmonize with the natural surroundings. Parking areas serve as transitional spaces into the natural environment. Minimize the visual and aesthetic/sensory impacts of parking areas on the land. Design parking areas and trailheads to be visual gateways to the open space preserve that help transition visitors into the natural/rural environment.	Yes	The adjacency of the site to highway 35 minimizes the parking area's reach into the preserve, thereby avoiding fragmentation of landscape within the preserve. The site is a gradient, from forest to scattered woodland to a grassy clearing. The trailhead is then a gateway for visitors back into the forest. There is a large existing douglas fir tree framing trail, indicative of the parking area's location within a mixed conifer redwood forest.
Exhibit a Sense of Place	Express a consistent District design ethos across all preserves while highlighting local, environmental, and cultural context and the natural/rural aesthetic character of the preserve and setting. Parking area and trailhead design serves to provide visitors with a visual/experiential understanding of Midpen's values and mission. Seek opportunities to celebrate the unique attributes of the preserve.	Yes	The site is located along a scenic highway and the view of parking area from highway is in keeping with that aesthetic as much of the parking is screened by trees. Additional screening of the parking area is topographical, as the parking area terraced is downslope of the highway. Both proposed Purisima parking areas have the approach of utilizing terracing to minimize visual impact of the development. Gradient, celebrating different plant communities and landscape types within the parking area. Amplifying the glade-like character of this existing clearing in the middle of the forest as a place for refuge and light. Stone outcroppings within the footprint of the area to be developed will be removed and reused onsite. There will be usage and interpretation of a rare manzanita endemic to the site.
Address Sustainable Practices	Design using environmentally sustainable materials, colors, textures and construction practices that reflect and are compatible with the natural setting. Consider financial and staff resource impacts in design choices. Consider durable, low-maintenance design elements to minimize long-term maintenance requirements that complement the Design Guidelines' Values, Approach and Elements statements.	Yes	Material selections take into account financial and staff resources in addition to aesthetic considerations. A mix of carefully chosen materials provide some variety in terms of texture and color so as not to have a monotonous expanse. These materials vary in color and texture but in a way that is cohesive and naturalistic/rural in character.

Midpeninsula Regional Open Space District

July 23, 2025
Board Meeting 25-20

SPECIAL AND REGULAR MEETING

BOARD OF DIRECTORS
MIDPENINSULA REGIONAL OPEN SPACE DISTRICT

Wednesday, July 23, 2025

The Board of Directors conducted this meeting in accordance with California Government Code section 54953.

DRAFT MINUTES

REGULAR MEETING OF THE BOARD OF DIRECTORS OF THE MIDPENINSULA REGIONAL OPEN SPACE DISTRICT

President Cyr called the regular meeting of the Midpeninsula Regional Open Space District to order at 7:00 p.m.

ROLL CALL

Members Present: Jed Cyr, Craig Gleason, Karen Holman, Zoe Kersteen-Tucker, Yoriko Kishimoto, Margaret MacNiven, and Curt Riffle

Director Holman announced that she is participating in the meeting via teleconference using the AB 2449 "just cause" exemption due to illness and disclosed that no one over the age of 18 years is present at her remote location.

Members Absent: None

Staff Present: General Manager Ana Ruiz, General Counsel Hilary Stevenson, Assistant General Manager Susanna Chan, Assistant General Manager Brian Malone, District Clerk/Assistant to the General Manager Maria Soria, Executive Assistant/Deputy District Clerk Stephanie Gross, and Capital Projects Field Manager Bryan Apple

President Cyr announced that the public has the opportunity to comment on the agenda, and the opportunity to listen to this meeting through the internet or via telephone. This information can be found on the meeting agenda, which was physically posted at the District's Administrative Office, and on the District website.

ORAL COMMUNICATIONS

Public comment opened at 7:02 p.m.

District Clerk/Assistant to the General Manager Maria Soria reported there were no public speakers for this item.

Public comment closed at 7:02 p.m.

ADOPTION OF AGENDA

Motion: Director Riffle moved, and Director Kishimoto seconded the motion to adopt the agenda.

ROLL CALL VOTE: 7-0-0

CONSENT CALENDAR

Directors Riffle noted that Dan O'Day submitted a comment for Agenda Item #3 - Award of Contract for South Area Demolitions Project at Sierra Azul Open Space Preserve and that he was present to make a comment.

President Cyr pulled Agenda Item #3 from the Consent Calendar. He then asked for a motion to approve all the remaining Consent Calendar items, excluding Agenda Item #3.

Public comment opened at 7:04 p.m.

Ms. Soria reported that there were no public comments except for Agenda Item #3.

Public comment closed at 7:04 p.m.

Motion: Director Riffle moved, and Director MacNiven seconded the motion to approve the Consent Calendar with the exception of item 3.

ROLL CALL VOTE: 7-0-0

Public comment opened at 7:05 p.m.

Dan O'Day spoke on Agenda Item #3 and spoke about debris left from a previous Twin Creeks demolition. He requested that the 11 satellite dishes and remaining debris be brought to the planned demolition site so that they can be disposed. Additionally, he suggested that the Graf house could potentially be used for ranger housing, and that the existing water system should be preserved during the demolition to serve the Graf property. He pointed out that there is also a well and that it should be investigated for continued use, possibly adding a fire hydrant, and ensuring that it is either properly maintained or sealed if abandoned.

Public comment closed at 7:16 p.m.

General Manager Ana Ruiz stated that Mr. O'Day's comment, including the pictures, was provided to the Board of Directors (Board) and shared with the project team staff. She stated that staff will also follow up.

Motion: Director Gleason moved, and Director MacNiven seconded the motion to approve Agenda Item #3 of the Consent Calendar.

ROLL CALL VOTE: 7-0-0

1. Approve the July 9, 2025 Board meeting minutes

2. Approve Claims Report

3. Award of Contract for South Area Demolitions Project at Sierra Azul Open Space Preserve (R-25-99)

General Manager's Recommendations:

1. Authorize the General Manager to enter into a contract with Randazzo Enterprises Inc., of Castroville, California for a not-to-exceed base contract amount of $713,917 to complete the South Area Demolitions Project.
2. Authorize a 10% contingency in the amount of $71,392 to be reserved for unanticipated issues, bringing the total not-to-exceed contract amount of $785,309.

4. Award of Contract for Schematic Design Services for the Hawthorns Area Plan (R-25-100)

General Manager's Recommendations:

1. Authorize the General Manager to enter into a contract with CSW|ST2 to provide schematic design services to develop staging area options for the Hawthorns Area Plan for a base amount of $169,640.
2. Authorize a 15% contingency of $25,446 to cover unforeseen tasks beyond the current scope.
3. Authorize a separate 15% contract allowance of $25,446, specifically for additional work supporting engagement and coordination with the Town of Portola Valley beyond the current scope of work, to avoid implementation delays, for a combined not-to-exceed contract amount of $220,532.

5. Contract Amendment for Construction Special Inspection Services with BKF Engineers for the Prospect Road Culvert Replacement Project in Fremont Older Open Space Preserve (R-25-101)

General Manager's Recommendation: Authorize a contract amendment in the amount of $43,775 with BKF Engineers of Redwood City, California to provide special construction inspection services for the Prospect Road Culvert Replacement Project (Project), bringing the existing contract to a new not-to-exceed total amount of $138,034.

6. Amendment to License Agreement with Crown Castle for Use of the Redwood Radio Tower (R-25-103)

General Manager's Recommendation: Authorize the General Manager to amend the communications lease exchange with Crown Castle to increase the monthly rent by $100 starting August 1, 2025, to add an additional antenna to the Redwood Radio Tower site located at 21450 Madrone Drive in Los Gatos with a total amended 10-year and 30-year cost not-to-exceed $195,486 and $821,339, respectively.

7. Memorandum of Understanding with Public Risk Innovation, Solutions, and Management (PRISM) for the Midpeninsula Regional Open Space District Employee Vision Insurance Program (R-25-104)

General Manager's Recommendations:

1. Authorize the General Manager to execute a Memorandum of Understanding (MOU) with Public Risk Innovation, Solutions, and Management (PRISM) for the Midpeninsula Regional Open Space District Employee Vision Insurance Program.
2. Adopt a resolution authorizing the General Manager to take future administrative actions necessary to continue participation in PRISM's dental and vision insurance programs.

8. Award of Contract with Geocon Consultants, Inc., to provide geotechnical consulting services for the Graf House Legalization Project (R-25-105)

General Manager's Recommendations:

1. Authorize the General Manager to enter into a contract with Geocon Consultants, Inc., to provide geotechnical consulting services in support of the Graf House Legalization Project for a base amount not to exceed $51,910.
2. Authorize a 10% contingency of $5,191 to cover unforeseen conditions for a total contract amount not to exceed $57,101.

BOARD BUSINESS

9. First Reading of the Board Compensation Ordinance (R-25-106)

General Counsel Hilary Stevenson presented.

Public hearing opened at 7:22 p.m.

Ms. Soria reported there were no comments for the public hearing.

Public hearing closed at 7:22 p.m.

Director Holman commented that there had been a previous discussion regarding increasing the number of compensable meetings per month, particularly for the presiding Board President due to the number of meetings associated with the role. She inquired whether it would be possible to increase the number of compensable meetings.

Ms. Stevenson stated that current state law limits board compensation to six compensable meetings per month, and this applies to all park and open space districts, with the exception of East Bay Regional Park District. She suggested this could be considered as a future legislative initiative, pending Board support, and deferred to the General Manager to work with the legislative team to explore potential opportunities.

Motion: Director Kishimoto moved, and Director Riffle seconded the motion to:

1. Waive reading and introduce an ordinance increasing Board compensation from $121.28 to $127.34 per meeting day, pursuant to Public Resources Code section 5536.
2. Hold a public hearing on the proposed ordinance.

3. Direct the General Manager and General Counsel to prepare the ordinance for second reading/adoption at the August 13, 2025 Board meeting.

ROLL CALL VOTE: 7-0-0

10. Award of Contract for Construction Services to Install Wildlife-friendly Livestock Fencing and Self-closing Pedestrian Gates within the Central Area of La Honda Creek Open Space Preserve as part of the Phase II Trails Project to Prepare for the Fall 2025 Public Opening of New Trails (R-25-102)

Capital Projects Field Manager Bryan Apple presented. Assistant General Manager Brian Malone assisted in answering questions.

Public comment opened at 7:55 p.m.

Ms. Soria reported there were no public speakers for this item.

Public comment closed at 7:55 p.m.

Motion: Director Riffle moved, and Director Holman seconded the motion in honor of former Board Director Larry Hassett to authorize the General Manager to enter into a contract with Hammer Fence and Construction, Inc., to complete gate and fencing installation in preparation for public trail use, for a base amount not-to-exceed $54,971 and authorize a 15% contingency in the amount of $8,245 to be reserved for unanticipated issues for a total contract amount not-to-exceed $63,216.

ROLL CALL VOTE: 7-0-0

INFORMATIONAL REPORTS

A. Committee Reports

Director Gleason reported on the Legislative, Funding, and Public Affairs Committee meeting held on July 15, 2025. He explained that the Committee expressed interest in discussing with the full Board the possibility of contributing to and supporting local agencies and nonprofits on projects that are not necessarily on District land and do support the District's mission.

Ms. Ruiz stated that the item is a policy-level discussion and would best be addressed at the December Board Retreat.

B. Staff Reports

Mr. Malone provided an update on the development of the Bear Creek Stables lease agreement. He advised the Board that on July 31, 2025, Santa Clara County Supervisor Margaret Abe-Koga will be hosting the Lehigh Townhall meeting, which is open to the public.

Ms. Ruiz reported that the District partnered with the Santa Clara Valley Open Space Authority to co-lead educational sessions with the Silicon Valley Youth Climate Action Group, which were held on July 17, 2025 followed by a site tour of the Cathedral Oaks area of Sierra Azul Open

Space Preserve held on July 18. She also reported attending the Permanente Creek Restoration Ribbon Cutting Ceremony hosted by Heidelberg Materials and Santa Clara County Supervisor Margaret Abe-Koga.

C. Director Reports

Director MacNiven attended the La Honda Forest Health Management tour held on July 14, 2025. She also reported attending Dan Oday's presentation on July 16, 2025. Additionally, she and Director Kersteen-Tucker presented at the Town of Woodside council meeting held on July 22, 2025.

Director Kishimoto reported that she presented to the Town of Los Altos Hill Council on July 21, 2025.

Director Holman reported she attended the tour of the La Honda Forest Health Management Project held on July 14.

Director Riffle reported that he attended the Hawthorns Historic Complex site tour held on July 10, 2025, which included staff and council members from the Town of Portola Valley. He also attended the La Honda Forest Health Management and trails tours held on July 14. He further reported attending Dan Oday's presentation on July 16.

Director Kersteen-Tucker reported that she presented at the Town of Woodside council meeting held on July 22, 2025.

Director Gleason reported he attended the La Honda Forest Health Management and trails tours held on July 14. He also attended the Bay Area Ridge Trail supporters hike the week of July 14. He also attended a volunteer event over the weekend pulling yellow star thistle at El Sereno Open Space Preserve.

President Cyr attended the La Honda Forest Health Management tour held on July 14.

ADJOURNMENT

President Cyr adjourned the regular meeting of the Board of Directors of the Midpeninsula Regional Open Space District meeting at 8:15 p.m.

Maria Soria, MMC
District Clerk

MIDPENINSULA REGIONAL OPEN SPACE DISTRICT
CLAIMS REPORT
MEETING # 25-24

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Fiscal Year 25-26 EFT: *71.07%*

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11085	T - EFT	08/01/2025	11470 - Aecom Technical Services Inc	Phase 2 Alma Bridge Rd Newt Passage 5/3/25-6/27/25	313,230.18
10988	P - Printed	07/18/2025	11351 - Tiger Corporation	T76 New John Deere Tiger Mower Combination	248,104.09
11003	T - EFT	07/18/2025	10205 - Calif Joint Powers Insurance Authority	All Risk Property Prog/Auto Compreh Coll FY25-26	211,337.00
11032	T - EFT	07/18/2025	15224 - RACOM Corporation	Radio system upgrade project (10% due)	189,347.90
11134	T - EFT	08/01/2025	11432 - San Mateo Resource Conservation District	JR Habitat/Agricult Water Suppl Oct24-Jun25, SanG design/constructn oversight Jan-Mar25	169,670.87
11007	T - EFT	07/18/2025	10546 - Ecological Concerns, Inc.	FO forest health/ecosystem resilience, IPM: Twin Crks/BCR Tree Farm/Cherry Springs Jun25	125,346.19
11154	P - Printed	08/15/2025	15396 - Half Moon Bay Grading & Paving, Inc.	Bathtub Loop Drainage Upgrade Proj 7/1/25-7/30/25	120,269.52
11091	T - EFT	08/01/2025	15176 - Brannon Corporation	PR-ADA Barrier Removal Project 5/24/25-6/27/25	113,283.24
11044	T - EFT	07/18/2025	15384 - SFT Construction Corp	HT Interim Stabilization/Debris Removal June 2025	102,750.76
11192	T - EFT	08/15/2025	12185 - Pitcher Services, LLC	Driscoll Ranch Well Drilling Project 6/16/25-6/30/25	85,310.00
11203	T - EFT	08/15/2025	15384 - SFT Construction Corp	HT Interim Stabilization/Debris Removal, LM Corrals Replacement Project July 2025	78,889.24
11069	P - Printed	08/01/2025	10845 - City of Mountain View - Finance	Emergency radio dispatch services Apr-Jun 2025	73,778.25
11090	T - EFT	08/01/2025	10616 - BKF Engineers	NE Trailhd,ADA Barrier Rmvl,BCR N.ParkArea,BearCrkRd Clvrt,RVBayTrl Gate May-Jun25	59,637.50
11197	T - EFT	08/15/2025	11241 - Questa Engineering Corp.	Paulin Crossing/Slide Repair Project, Guadalupe Creek Crossing Replacement Mar-Jun 2025	52,744.91
11136	T - EFT	08/01/2025	15151 - Siegel & Strain Architects	Skyline Field Office Renovation Project Jun 2025	51,937.00
11040	T - EFT	07/18/2025	12191 - SAE Consulting Engineering	SA Ranger Housing Project June 2025	45,362.50
11014	T - EFT	07/18/2025	10005 - Grassroots Ecology	Service Learning Events/Community Outreach on District Lands Apr-Jun 2025	44,211.29
10978	P - Printed	07/18/2025	10304 - La Honda Pescadero Unified School Dist	Tax Compensatory Fee-July 2025 Installment	43,704.18
11025	T - EFT	07/18/2025	11859 - Montrose Environmental Solutions, Inc.	Programmatic Environmental Consulting May-Jun 2025	41,890.73
11143	T - EFT	08/01/2025	10978 - Vollmar Natural Lands Consulting, Inc	Big Dipper Ranch botanical surveys Mar-May25, LH suppl botanical surveys Mar-May25	41,192.00
11114	T - EFT	08/01/2025	10794 - John Northmore Roberts & Associates	BCS Improvements June 2025	39,370.34
11100	T - EFT	08/01/2025	10546 - Ecological Concerns, Inc.	Alpine Rd/Mult Mit. Sites Plant Install/Maint May-Jun 2025	38,128.70
11017	T - EFT	07/18/2025	15349 - Jodi McGraw Consulting	SCKR Habitat and Population Management Plan 2/10/25-6/30/25	37,104.60
10980	P - Printed	07/18/2025	11924 - Nomad Ecology	RR/Cherry Springs botan surveys May25,Marbled Murrelet forest surveys Apr-May 2025	36,172.10
11087	T - EFT	08/01/2025	11148 - Balance Hydrologics, Inc	Purisima Pond Improvement Project 5/18/25-6/30/25	34,302.25
10976	P - Printed	07/18/2025	15396 - Half Moon Bay Grading & Paving, Inc.	Bathtub Loop Drainage Upgrade Project 6/25/25-6/30/25	32,572.28
11109	T - EFT	08/01/2025	12160 - H & E Equipment Services	Equip rent:SFO-dozer, large&small excavtr 6/10-7/7, LH-dozer, large&small excavtr 7/8-8/4	30,942.74
10972	P - Printed	07/18/2025	12134 - Digital Story Company	Underwriting of TV series OpenRoad Season 11	30,000.00
10963	P - Printed	07/18/2025	15045 - All Earth Geotechnical Engineering	Pescadero Creek Watershed Sediment May-June 2025	29,939.00
11075	P - Printed	08/01/2025	11924 - Nomad Ecology	RR/CherrySprg botan,TwinCrk bird nest/MarbledMurrl survey Jun25,SCKR habitat Mar25	29,707.05
11174	T - EFT	08/15/2025	15368 - Custom Tops Inc	A111, M243, M239 - Camper shell & utility build out 7/29/25-7/30/25	28,497.72
11043	T - EFT	07/18/2025	12238 - Saved By Nature	Grantmaking:Saved By Nature-Youth Outdr Equity Feb-Jun25, Stevns Crk Shore Hike 6/7	27,975.00
11188	T - EFT	08/15/2025	12197 - Old La Honda General Engineering	Big Dipper Ranch Culvert Repair July 2025	24,713.30
10996	T - EFT	07/18/2025	11898 - Bay Area Tree Specialists	Bear Creek Redwoods Biomass Treatment 4/30/25-5/7/25	24,650.00
11034	T - EFT	07/18/2025	15095 - ReadySet Solution Co	Diversity, Equity and Inclusion Services June 2025	23,500.00
11051	T - EFT	07/18/2025	10978 - Vollmar Natural Lands Consulting, Inc	Districtwide Herpetofauna Surveys May 2025	21,102.00
11028	T - EFT	07/18/2025	12020 - Panorama Environmental, Inc.	10-Year Review of the IPM Program June 2025	20,961.25
11151	P - Printed	08/15/2025	15147 - Conlin Fence Company Inc.	Perimeter fence repair/repl-Butano Farms 4/23/25-4/30/25	18,790.00
11096	T - EFT	08/01/2025	11318 - Confluence Restoration	Alma Cultural Landscape/BCR Trails Plant Install/Maint June 2025	18,542.46
11127	T - EFT	08/01/2025	10079 - Page & Turnbull, Inc.	FO House Re-Roofing & Exterior Repairs May-Jun 2025	17,381.25
11142	T - EFT	08/01/2025	10216 - Valley Oil Company	Fuel for District Vehicles July 2025	16,697.83
11020	T - EFT	07/18/2025	10791 - LSA Associates, Inc.	Badger Transect Surveys May-Jun 2025, LH Hist Resource Eval Jun25	16,305.51
11177	T - EFT	08/15/2025	15118 - Folger Graphics, Inc	Summer Views Newsletter (12,400 qty), Ordinance Book (150 qty)	16,027.17
11202	T - EFT	08/15/2025	11432 - San Mateo Resource Conservation District	Design and construction oversight Apr-Jun 2025	15,515.37
11135	T - EFT	08/01/2025	10697 - Sandis	HT Area Plan Topo Survey Svcs May-Jun25, Madonna Crk Rnch Access Rd Survey/Flag Jun25	15,465.45
11144	T - EFT	08/01/2025	11665 - Waterways Consulting	Bean Hollow Reservoir System Evaluation 4/23/25-6/30/25	15,435.55
11089	T - EFT	08/01/2025	11430 - BioMaAS, Inc.	LGC Watershed Collab May-Jun25, ADA Barrier Removal Proj-Bio Monit/Report 7/1-7/25	15,168.00
11058	P - Printed	08/01/2025	11396 - Agco Hay LLC	DR Graze Unit Folger Corrals Wire Trap 5/1-6/15	15,000.00
10973	P - Printed	07/18/2025	10546 - Ecological Concerns, Inc.	Botanical Svcs for new SFO Apr-Jun 2025, Irish Ridge Restoration Pre-Treatment Jun 2025	14,402.82

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11104	T - EFT	08/01/2025	15415 - G3 Enterprises, Inc.	BCS Soil Order (182 tons) 7/24/25	14,215.00
11187	T - EFT	08/15/2025	11859 - Montrose Environmental Solutions, Inc.	Storm Damage Repair at PCR OSP June 2025	13,947.28
11117	T - EFT	08/01/2025	10419 - Lincoln National Life Insurance Co.	Life, LTD, AD&D Insurance Aug 2025	13,403.38
11118	T - EFT	08/01/2025	10791 - LSA Associates, Inc.	WC Culvert Replacement Enviro Svcs Apr-Jun 2025, Driscoll Well Bio Services June 2025	13,365.35
11099	T - EFT	08/01/2025	10032 - Del Rey Building Maintenance	AO/SAO/FFO/RSACP/SFO/CAO Janitorial Service July 2025	13,219.82
11207	T - EFT	08/15/2025	10146 - Tires On The Go	Tire maintenance/repair/replacement for (17) vehicles Nov 2024-Apr 2025	12,975.87
11171	T - EFT	08/15/2025	10205 - Calif Joint Powers Insurance Authority	Pollution Liability Insurance 7/1/25-6/30/26	12,390.00
11108	T - EFT	08/01/2025	10005 - Grassroots Ecology	Grantmaking:Local Indig Comm Land Access Apr-Jun25, Native Plant Prod/Propagule Coll	12,365.36
11046	T - EFT	07/18/2025	11996 - Spatial Informatics Group LLC	La Honda Forest Health Project June 2025	12,240.85
11181	T - EFT	08/15/2025	15385 - J&J Construction In.	Feral Cattle Removal Project 7/19/25, 7/31/25-8/2/25	12,000.00
10994	T - EFT	07/18/2025	10606 - Ascent Environmental Inc	LHC Parking and Trailhead Access CEQA May-Jun 2025	11,926.20
11018	T - EFT	07/18/2025	11906 - Law Offices of Gary M. Baum	Legal Svcs-Coastal RealProperty Transactions June 2025	11,690.00
11132	T - EFT	08/01/2025	15348 - Renne Public Law Group	GM and GC 360 Review & Optional Executive Coaching June 2025	11,386.55
11006	T - EFT	07/18/2025	12224 - CSW-Stuber-Stroeh Engineering Group Inc	Hwy 35 Multi-use Trail Crossing & Parking Area Jun 2025	11,002.00
11111	T - EFT	08/01/2025	15405 - Herrera Environmental Consultants, Inc.	Purisima Crk Trail Slide/Bridge Repr Proj 6/6/25-6/30/25	10,852.93
11001	T - EFT	07/18/2025	15388 - BluePoint Planning, LLC	Strategy Plan Adaptation/Resilience to Climate Change 5/13/25-6/30/25	10,518.75
11092	T - EFT	08/01/2025	15117 - Buena Vista Services	La Honda Forest Health Project 3/1/25-6/30/25	10,498.80
11029	T - EFT	07/18/2025	10227 - Peninsula Open Space Trust	CL/SC Cost-Share Agreement Payment Apr-Jun 2025	10,032.50
11061	P - Printed	08/01/2025	15347 - Baird Livestock and Land Management LLC	Repr fence-Big Dipper May25, Veg Mgmt-Big Dipper/Mindego, Repr trough-Mindego Jun25	9,881.67
10974	P - Printed	07/18/2025	15394 - Elkhorn Slough Foundation	Central Coast Rangeland Coalition Scholars-2025	9,850.00
11183	T - EFT	08/15/2025	11906 - Law Offices of Gary M. Baum	Coastal Real Property Transactions Legal Svc July 2025	9,835.00
10970	P - Printed	07/18/2025	15108 - De Bella Mechanical, Inc.	AO-AC program work 8/27/24-9/17/24, 10/7/24-10/25/24, SAO heat pump svc call 1/25/25	9,733.48
11053	T - EFT	07/18/2025	11665 - Waterways Consulting	Madonna Crk Dam Erosion Proj 4/23-6/30, BH Reservoir System Evaluation 5/6/25	9,489.30
10964	P - Printed	07/18/2025	15347 - Baird Livestock and Land Management LLC	BigDipr debris remvl 4/7-4/14,AlpineRd fence repr 4/24-4/27,MindegoPnd gate repl 5/3	9,255.95
10991	T - EFT	07/18/2025	11470 - Aecom Technical Services Inc	Hwy 17 Wildlife/Regional Trail Crossing/Connect 3/1/25-4/25/25	9,140.00
11070	P - Printed	08/01/2025	15108 - De Bella Mechanical, Inc.	FFO HVAC supply fan replacement 1/21/25, Ste 400 VAV reprogramming Jan-Feb 2025	9,097.43
11164	T - EFT	08/15/2025	11470 - Aecom Technical Services Inc	Hwy 17 Crossings Project Services 4/26/25-6/30/25	8,915.00
11000	T - EFT	07/18/2025	15126 - Blankinship & Associates, Inc.	Pesticide Tech Literature Review Services June 2025	8,661.25
11063	P - Printed	08/01/2025	10466 - Bay Area Ridge Trail Council	Bay Area Ridge Trail Membership July 2025-June 2026	8,500.00
11052	T - EFT	07/18/2025	11586 - W H Dempsey Engineering	Septic Repair: Hawthorns 7/1/25-7/3/25, Bergman Old 7/5/25	8,362.25
11048	T - EFT	07/18/2025	10302 - Stevens Creek Quarry, Inc.	BCS Base Rock for Upper Driveway, Material for Volunteer Trail Project June 2025	8,155.87
11105	T - EFT	08/01/2025	15100 - Gallagher Benefit Services, Inc.	Compensation and Classification Srvcs June 2025	8,137.50
11009	T - EFT	07/18/2025	11748 - Environmental & Energy Consulting	Consulting and Lobbying Services 5/16/25-6/15/25	8,000.00
11012	T - EFT	07/18/2025	15337 - Friends of Bear Creek Stables	BCS operator fee-care of 19 horses June 2025	8,000.00
11176	T - EFT	08/15/2025	11748 - Environmental & Energy Consulting	Consulting & Lobbying Services 6/16/25-7/15/25	8,000.00
11023	T - EFT	07/18/2025	11617 - Mig, Inc.	Edwards Prop Habitat Assess Proj 5/15/25-6/30/25,P2S Trl Regulatory Permit Supprt Jun25	7,839.25
11011	T - EFT	07/18/2025	10642 - Forensic Analytical Consulting Svcs Inc	Enviro Health Svcs: 4150 Sears Ranch (Cunha), 5701 La Honda Rd. (Folger) 5/27/25-6/19/25	7,579.10
11209	T - EFT	08/15/2025	10350 - Valbridge Property Advisors	Fogarty Winery Fee & Trail Easement Appraisal 7/21/25	7,500.00
11119	T - EFT	08/01/2025	12223 - MacKay & Somps Civil Engineers	HT-rural survey for building footprints 5/12/25-6/8/25	7,458.39
11173	T - EFT	08/15/2025	11739 - CDW LLC	Plotter w/ warranty (3 year), plotter ink cartridges (14 qty) 7/18/25	7,420.50
11088	T - EFT	08/01/2025	15130 - Bellecci & Associates	RSA Service Rd/ADA Path Improv Proj June 2025	6,928.88
11071	P - Printed	08/01/2025	10546 - Ecological Concerns, Inc.	Invasive Plant Treatment for LR Forest Health Project May-June 2025	6,847.71
11139	T - EFT	08/01/2025	15042 - SummitWest Environmental Inc	Purisima Creek Marbled Murrelet Surveys June 2025	6,670.88
10998	T - EFT	07/18/2025	11430 - BioMaAS, Inc.	Bio monitor svcs-Skyline ADA barrier removal, WEAP training Jun 2025	6,666.74
11156	P - Printed	08/15/2025	15403 - Rich's Tires Inc.	M222, M224, P124, P134 (4) new tires, M222, P131, T78, T78 tire service May-Jun 2025	6,618.98
11199	T - EFT	08/15/2025	15375 - Romig Engineers, Inc.	LHC Event Center Geotechnical Report 4/29/25-6/30/25	6,450.00
11167	T - EFT	08/15/2025	11148 - Balance Hydrologics, Inc	Purisima Pond Improvement Project 7/1/25-7/19/25	6,430.80
10967	P - Printed	07/18/2025	12220 - California Department of Technology	Microsoft True Up Fees May 2024	6,192.73
11021	T - EFT	07/18/2025	15379 - MCCi, LLC	Document scanning and uploading services	6,154.24

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11084	T - EFT	08/01/2025	15136 - 4 Rivers Ranch Equipment LLC	Lone Madrone Pasture 3 Corral 4/3/25	6,114.00
11182	T - EFT	08/15/2025	12179 - Law Office of Peter Kiel PC	Cloverdale Ranch Legal Fees July 2025	5,875.00
11055	T - EFT	07/18/2025	11118 - Wex Bank	Fuel for district vehicles June 2025	5,486.43
11116	T - EFT	08/01/2025	10058 - Liebert Cassidy Whitmore	ERC Consortium Membership Subscript 7/1/25-6/30/26	5,355.00
11194	T - EFT	08/15/2025	10276 - Portola Park Heights Prop. Owners Assoc.	LR Portola Heights Road Association fees	5,240.00
11212	T - EFT	08/15/2025	11118 - Wex Bank	Gas for District Vehicles July 2025	5,222.74
11120	T - EFT	08/01/2025	15379 - MCCi, LLC	Document scanning and uploading services	5,203.04
10968	P - Printed	07/18/2025	11397 - COMMITTEE FOR GREEN FOOTHILLS	2025 Nature's Inspiration Sponsorship	5,000.00
10986	P - Printed	07/18/2025	15159 - Silicon Valley Youth Climate Action	2025 Impact Summit Sponsorship	5,000.00
11015	T - EFT	07/18/2025	15399 - California Invasive Plant Counsel	Cal-IPC Annual Symposium Sponsorship	5,000.00
11178	T - EFT	08/15/2025	11737 - Friends of Stevens Creek Trail	State of the Creek Summit Sponsorship	5,000.00
11196	T - EFT	08/15/2025	10211 - Public Policy Advocates	GM Signature Authority Legislation July 2025	5,000.00
11121	T - EFT	08/01/2025	11617 - Mig, Inc.	RSA Rd/ADA Path Improv CEQA Svcs Jun25, Paulin Cross/Slide Repr Enviro Svc May-Jun25	4,751.75
11060	P - Printed	08/01/2025	12219 - Avila and Associates Consulting Eng Inc	Habitat Assess for Hwy 35 Spur Trail Area June 2025	4,707.50
10992	T - EFT	07/18/2025	11863 - ALBION ENVIRONMENTAL INC	Cultural Resource Assessment-LH Phase II Trails Jun 2025	4,681.28
11169	T - EFT	08/15/2025	10616 - BKF Engineers	Phase II ADA Barrier Removal 5/26/25-6/29/25	4,678.00
10989	P - Printed	07/18/2025	15004 - USDA-Animal and Plant Health Inspection	Wild Boar Trapping-June 2025	4,552.77
11159	P - Printed	08/15/2025	15417 - Scapes, Inc.	Purisima Pond vegetation management 7/23/25	4,536.00
11186	T - EFT	08/15/2025	15369 - Monk & Associates Inc.	Prospect Rd Culvert Repair Project July 2025	4,417.50
11200	T - EFT	08/15/2025	11479 - Rootid, LLC	20 implementation hours, web maintenance retainer July 2025	4,349.00
11106	T - EFT	08/01/2025	10187 - Gardenland Power Equipment	Restck parts/fuel drum,small eng fuel,T79 mower parts,brush cutter blades,hedge trmr	4,228.48
10966	P - Printed	07/18/2025	15167 - Dept of Forestry and Fire Protection	FY26 CALFIRE Allen Peak Radio Tower Annual Lease, Year 2	4,227.00
10971	P - Printed	07/18/2025	12123 - DGS Department of General Services	FY26 DGS Allen Peak Radio Tower Annual Lease, Year 2	4,227.00
11036	T - EFT	07/18/2025	15352 - Redwood Public Law, LLP	All Staff Ethics Training Refresh May 2025	4,142.00
11024	T - EFT	07/18/2025	15369 - Monk & Associates Inc.	Prospect Rd Culvert Repair Project June 2025	4,129.60
11068	P - Printed	08/01/2025	10464 - City of Foster City	CALOpps external website development, support & shared hosting 7/1/25-6/30/26	4,078.00
11147	P - Printed	08/15/2025	15164 - Branching Out Adventures	SR Hikes-Queer Nature Journaling, LGBTQ+ Community (reissue lost checks from 6/18,7/3)	4,000.00
11110	T - EFT	08/01/2025	11489 - Haro Kasunich & Associates Inc.	BCR N.Parking Area permit/bid supprt Apr-Jun25,ADA Barrier Remvl Proj 5/5/25-6/30/25	3,969.25
10984	P - Printed	07/18/2025	11603 - San Mateo County Fire Department	Fire Services Fee-July 2025 Installment	3,835.24
11064	P - Printed	08/01/2025	11386 - Bob Murray & Associates	E&C Manager Recruitment	3,800.00
11131	T - EFT	08/01/2025	15098 - Renson Automotive	Fleet maintenance: M205, M215, M226, P112 July 2025	3,505.85
11078	P - Printed	08/01/2025	15412 - CA Assoc of Recreation and Park District	Membership Dues for Fiscal Year 7/1/25 - 6/30/26	3,500.00
11193	T - EFT	08/15/2025	15047 - Point One Electrical Systems, Inc.	AO conference room upgrade 4/30/25	3,482.89
11059	P - Printed	08/01/2025	11985 - Applied Technology & Science, ATS	Fremont Older OSP Nesting Bird Surveys June 2025	3,390.70
11050	T - EFT	07/18/2025	10435 - The Ferguson Group LLC	Retainer Invoice for June 2025	3,333.33
11030	T - EFT	07/18/2025	10212 - Pinnacle Towers LLC	Skeggs radio tower lease July 2025	3,221.10
11129	T - EFT	08/01/2025	10212 - Pinnacle Towers LLC	Skeggs radio tower lease Aug 2025	3,221.10
11141	T - EFT	08/01/2025	10435 - The Ferguson Group LLC	Grants Consulting Services Mar, Jun 2025	3,062.50
11184	T - EFT	08/15/2025	15022 - Lawrence R. Jensen & Associates	Real Estate Legal Services 6/27/25-7/25/25	3,015.00
11049	T - EFT	07/18/2025	10143 - Summit Uniforms, LLC	Uniform hats restock-AO & Field staff (130 qty), uniform shirt (1), Seasonal OST sew patches	2,926.88
11080	P - Printed	08/01/2025	10151 - Safety Kleen Systems Inc	Empty fuel drum disposal 7/14/25	2,883.38
11211	T - EFT	08/15/2025	10978 - Vollmar Natural Lands Consulting, Inc	eDNA sampling for herpetofauna June 2025	2,802.00
10999	T - EFT	07/18/2025	10616 - BKF Engineers	Prospect Rd Culvert Replacement 3/31/25-5/25/25	2,748.65
11042	T - EFT	07/18/2025	10136 - San Jose Water Company	Water service: RSACP 5/19/25-6/18/25, RSACP-EQ 4/23/25-6/20/25 SAO 5/27/25-6/25/25	2,733.89
11180	T - EFT	08/15/2025	12160 - H & E Equipment Services	Roller rental for PR parking lot 5/27/25-6/3/25	2,712.51
11185	T - EFT	08/15/2025	10791 - LSA Associates, Inc.	LM Corrals Biomonitoring, Historical Res Consult Serv/LHC Bridge July 2025	2,571.85
10987	P - Printed	07/18/2025	15404 - The Stewardship Network	30x30 Partnership 2025 Summit Sponsorship	2,500.00
10995	T - EFT	07/18/2025	12131 - Bay Area Older Adults, Inc.	June 25, 2025 Thornwood Hike	2,500.00
11146	P - Printed	08/15/2025	15124 - Boys and Girls Club of the Coastside	Los Trancos Hike: July 10th, 2025	2,500.00

MIDPENINSULA REGIONAL OPEN SPACE DISTRICT
CLAIMS REPORT
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Fiscal Year 24-25 EFT: *68.53%*
Fiscal Year 25-26 EFT: *71.07%*

Payment Number	Payment Type	Payment Date	Vendor Name/Number	Invoice Description	Payment Amount
11190	T - EFT	08/15/2025	12239 - Pie Ranch	Apple Orchard Sponsor	2,500.00
10977	P - Printed	07/18/2025	15009 - HANA Resources, Inc.	Strategic Grant Support Tools June 2025	2,455.00
11165	T - EFT	08/15/2025	10128 - American Tower Corporation	Coyote Peak tower lease Aug 2025	2,376.01
11038	T - EFT	07/18/2025	10324 - Rich Voss Trucking Inc	BCS/BCR rock trucking 6/26/25-6/27/25	2,336.00
11160	P - Printed	08/15/2025	10489 - Stetson Engineers Inc	Watermaster Fees 7/1/24-6/30/25	2,326.29
10993	T - EFT	07/18/2025	10128 - American Tower Corporation	Coyote Peak tower lease July 2025	2,307.01
11056	T - EFT	07/18/2025	12050 - Wiss, Janney, Elstner Associates, Inc.	FFO Annex Foundation Repair 5/5/25-6/1/25	2,295.00
11137	T - EFT	08/01/2025	11730 - Standard Insurance Company RV	Basic & Supplemental Life Ins Aug 2025	2,216.00
11098	T - EFT	08/01/2025	11699 - Dakota Press	2026 Budget Book, 2026 Budget in Brief	2,195.59
11153	P - Printed	08/15/2025	10344 - Greg's Trucking Service, Inc.	LH trucking for rip rap for culverts 7/9/25	2,192.50
11047	T - EFT	07/18/2025	11730 - Standard Insurance Company RV	Basic & Supplemental Life Ins July 2025	2,161.91
11057	T - EFT	07/30/2025	10428 - Alliant Insurance Services Inc	Commercial Crime Ins Renewal 7/1/25-7/1/26	2,158.00
11072	P - Printed	08/01/2025	12200 - Granite Data Solutions	New Dell 24" monitors (10 units) 7/22/25	2,090.64
11145	P - Printed	08/15/2025	10141 - Big Creek Lumber Co Inc	Lumber for FFO Stock	2,086.42
11081	P - Printed	08/01/2025	10115 - Vince Fontana	Predation reimbursement: Elkus-Lobitos-South Cowell Grazing Unit	2,085.25
11035	T - EFT	07/18/2025	12256 - Red River Technology LLC	Microsoft Teams 5/13/25-6/12/25	2,044.88
10981	P - Printed	07/18/2025	15071 - Otis Elevator Company	AO elevator maintenance services Jan-Jun 2025	1,952.04
11148	P - Printed	08/15/2025	10289 - Cal-Line Equipment, Inc.	T38 New Wheels & Tires for Chipper 7/15/25	1,873.88
11123	T - EFT	08/01/2025	10125 - Moffett Field Supply Company	Toilet paper rolls and hand sanitizer for public restrooms 7/7/25	1,838.74
11112	T - EFT	08/01/2025	15398 - Integral Consulting Inc.	Alpine Road Mitigation Monitoring & Reporting June 2025	1,802.00
11133	T - EFT	08/01/2025	15066 - Ryan's Pumping Service, Inc	ECdM/PCR public restroom Vault pump 7/25/25, SFO/VIP vault pumping 7/16/25	1,800.00
10979	P - Printed	07/18/2025	15358 - Lahlouh, Inc.	Maps: ECdM (1,000 qty), South Skyline (1,000 qty)	1,780.06
11074	P - Printed	08/01/2025	15338 - Heritage Growers	Plant and seed services July 2025	1,682.03
11115	T - EFT	08/01/2025	12179 - Law Office of Peter Kiel PC	Cloverdale Ranch Legal Fees June 2025	1,580.00
11102	T - EFT	08/01/2025	11736 - Fossil Industries, Inc.	Picchetti Interpretive Panel 7/24/25	1,565.00
11113	T - EFT	08/01/2025	10394 - Interstate Traffic Control Pro	Pulgas Ridge Parking Lot Wheel Stops (22 qty)	1,564.06
11037	T - EFT	07/18/2025	15098 - Renson Automotive	M235 repl EGR temp sensor, eng air filter, M33/M201 bi-annual maint July 2025	1,548.55
11083	P - Printed	08/01/2025	10234 - WJ Sorich Enterprises	Sorich Road Dues	1,500.00
11198	T - EFT	08/15/2025	10932 - RDO Equipment Company	T77 100 Hour Service	1,463.68
11206	T - EFT	08/15/2025	10143 - Summit Uniforms, LLC	Uniform Shirts for 7 Seasonal OSTs, Ranger Aide Uniform, Ranger Uniform	1,462.34
11191	T - EFT	08/15/2025	10140 - Pine Cone Lumber Co Inc	Lumber for T49-repair decking, RSACP-sign posts, Pulgas Ridge-signs	1,432.96
11004	T - EFT	07/18/2025	15120 - CCATT LLC	Tower lease Redwood site July 2025	1,432.22
11094	T - EFT	08/01/2025	15120 - CCATT LLC	Redwood radio tower lease Aug 2025	1,432.22
11086	T - EFT	08/01/2025	11814 - AMERICAN PORTABLES	Portable Restrm Rental: FOOSP/SA-Ken Tr 7/8/25-8/4/25, SA Dept Meeting 7/7/25-7/8/25	1,310.36
11073	P - Printed	08/01/2025	11551 - Green Team of San Jose	RSA Garbage Service July 2025	1,300.25
11152	P - Printed	08/15/2025	11551 - Green Team of San Jose	RSA Garbage Service Aug 2025	1,300.25
11066	P - Printed	08/01/2025	10454 - California Water Service	FFO Water Service 6/5/25-7/2/25	1,263.55
11076	P - Printed	08/01/2025	12202 - Nwestco LLC	SFO fuel tank vapor recovery test, additional fuel hose 7/1/25	1,262.39
11210	T - EFT	08/15/2025	15378 - VMI INC	Assisted listening equipment for offsite meetings	1,251.92
11175	T - EFT	08/15/2025	11699 - Dakota Press	3,000 Preserve Maps: RSA & WH	1,203.66
11189	T - EFT	08/15/2025	12006 - On Point Land Management, Inc.	IPM program review & recommendations 7/1/25-8/1/25	1,155.00
11065	P - Printed	08/01/2025	12153 - California Sport Design LLC	Carthartt hooded sweatshirts (16 qty) 4/8/25	1,095.94
11079	P - Printed	08/01/2025	10182 - Royal Brass Inc	T80 Mowing equip hydraulic hoses, Replacement Hose for Air Chuck	1,093.52
11201	T - EFT	08/15/2025	10136 - San Jose Water Company	RSACP Water Service 6/18/25-7/17/25, SAO Water Service 6/25/25-7/24/25	1,080.04
11033	T - EFT	07/18/2025	10932 - RDO Equipment Company	T78 100 Hr Service	1,053.59
11002	T - EFT	07/18/2025	15119 - Boucher Law, PC	Legal Srvcs- Employ & Personnel advice May 2025	1,053.50
11062	P - Printed	08/01/2025	15090 - Bat Conservation International	Acoustic bat data processing 4/7/25-5/30/25	1,053.35
10982	P - Printed	07/18/2025	10589 - Recology South Bay	Green Waste Recycle June 2025	1,035.52
11125	T - EFT	08/01/2025	12235 - Pacific Office Automation	Lease 8 machines - 6/27/25-7/26/25	1,032.63

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Fiscal Year 25-26 EFT: *71.07%*

Payment Number	Payment Type	Payment Date	Vendor Name/Number	Invoice Description	Payment Amount
11022	T - EFT	07/18/2025	10190 - Metro Mobile Communications	T038 install radio & antenna system 4/11/25	1,019.44
10961	P - Printed	07/18/2025	12090 - Action Towing	Tow camper trlr from BCS to disposal facility 6/26, T038 tow from Page Mill Rd to FFO 7/3	1,006.50
10997	T - EFT	07/18/2025	15139 - Belkorp AG LLC	ATV20 JD Gator Service	1,002.37
11122	T - EFT	08/01/2025	11989 - Modiv Design, Inc.	ADA Sign Revisions 5/23/25-6/30/25	1,000.00
10975	P - Printed	07/18/2025	11927 - Forrest Telecom Engineering, Inc.	Radio engineering consultant services 6/24/25-6/30/25	963.00
11019	T - EFT	07/18/2025	10058 - Liebert Cassidy Whitmore	Legal Srvcs, negotiations & related matter May-Jun 2025	945.00
11067	P - Printed	08/01/2025	12247 - PaleoWest, LLC dba Chronicle Heritage	Cultural Res-WEAP for OSMRP Crews Jun-Jul 2024	921.47
11168	T - EFT	08/15/2025	11430 - BioMaAS, Inc.	Bio Surveys LH Crk Bathtub Loop Drainage Jul 2025, GIS Support on Butano Creek 7/23/25	907.10
11179	T - EFT	08/15/2025	10187 - Gardenland Power Equipment	Pole saw chain spool, parts for equipment repair	869.83
11172	T - EFT	08/15/2025	11872 - Castle Pumping & Plumbing Services	DHF Summer Camp Septic Pumping 7/4/25, 7/28/25	790.00
11010	T - EFT	07/18/2025	11701 - Eric Gouldsberry Art Direction	Midpen Fact Sheets Design/Production	787.50
11005	T - EFT	07/18/2025	12109 - Christine Sculati	Hwy 17 Crossing Projects Grant Development Jun 2025	781.25
11026	T - EFT	07/18/2025	15387 - Mpire Ventures LLC	HubSpot Consultant Services 6/26/25	750.00
11045	T - EFT	07/18/2025	12082 - Sicular Environmental Consulting	La Honda Forest Health Project Apr-Jun 2025	747.00
11041	T - EFT	07/18/2025	10099 - San Francisco Bay Bird Observatory	Snowy Plover Monitoring at Stevens Creek Shoreline June 2025	695.52
11054	T - EFT	07/18/2025	11852 - Western Exterminator Co.	Roden Control: BCR 6/27/25, RSA Annex Garage 6/10/25	692.41
11126	T - EFT	08/01/2025	12235 - Pacific Office Automation	Usage for 8 machines 2/19/25-5/19/25	679.73
11205	T - EFT	08/15/2025	10302 - Stevens Creek Quarry, Inc.	Rock for Stock	676.33
11039	T - EFT	07/18/2025	11479 - Rootid, LLC	Web maintenance retainer June 2025	649.00
10965	P - Printed	07/18/2025	11750 - Beneficial Designs, Inc	ADA Trail and E-bike Sign Review June 2025	635.50
10969	P - Printed	07/18/2025	11224 - County of Santa Clara Comm Dept	County oversight of radio upgrade June 2025	561.00
11027	T - EFT	07/18/2025	10921 - Ninyo & Moore	Geotech Eval-Madonna Dam Repair Proj 6/1/25-6/27/25	532.50
10962	P - Printed	07/18/2025	15065 - Alexander Rinkert	Marbled Murrelet LH Surveys June 2025	511.50
10985	P - Printed	07/18/2025	11059 - San Mateo County Health Dept	Water test at multiple locations June 2025	506.00
11170	T - EFT	08/15/2025	15126 - Blankinship & Associates, Inc.	Draft technical report and infographics July 2025	501.25
11103	T - EFT	08/01/2025	10169 - Foster Brothers Security Systems	VS lock and key supplies (12 sets) 7/1/25, SAO keys for cabinet (15 qty) 7/9/25	490.34
10983	P - Printed	07/18/2025	10194 - Reed & Graham Inc	BCS Erosion Control Materials 6/2/25	485.62
10990	T - EFT	07/18/2025	15228 - A (Plus) Livescan Services	Livescan June 2025	484.00
11093	T - EFT	08/01/2025	11872 - Castle Pumping & Plumbing Services	DHF Summer Camp Septic Tank Pumping 6/14/25	395.00
11149	P - Printed	08/15/2025	15419 - CCC Office of the Sheriff LETC	Radar Operator Course 9/8/25-9/10/25	365.00
11013	T - EFT	07/18/2025	10187 - Gardenland Power Equipment	Brushcutter Repair 6/25/25	363.64
11107	T - EFT	08/01/2025	10343 - Granite Rock Company	Concrete Material Disposal 6/25/25	300.00
11130	T - EFT	08/01/2025	15046 - Prometheus Fire Consulting LLC	Rancho de Guadalupe SA OSP-implementing prescribed fire 6/24/25	300.00
11128	T - EFT	08/01/2025	10140 - Pine Cone Lumber Co Inc	RSA Sign Post Lumber	287.29
11158	P - Printed	08/15/2025	10151 - Safety Kleen Systems Inc	FFO parts/tools washer service 7/22/25	240.40
11204	T - EFT	08/15/2025	15145 - Staples, Inc.	AO coffee/kitchen supplies 7/18/25	229.50
11208	T - EFT	08/15/2025	10403 - United Site Services Inc	LH Events Center ADA Restroom Rental 7/4/25-7/31/25	225.93
11157	P - Printed	08/15/2025	10182 - Royal Brass Inc	T77 Hydraulic Hose Assembly	215.74
11101	T - EFT	08/01/2025	11151 - Fastenal Company	PPE Electrolytes & Hearing Protection	212.94
11166	T - EFT	08/15/2025	10294 - AmeriGas - 0130	SFO Propane Rental 6/1/25-5/31/26	206.30
11150	P - Printed	08/15/2025	11156 - Clean Earth Environmental Services LLC	Hazmat Dropoff 12/24/24	199.42
11095	T - EFT	08/01/2025	10014 - CCOI Gate & Fence	Replace battery-Pheasant Rd Gate 7/1/25	197.00
11016	T - EFT	07/18/2025	11141 - Jarvis Fay LLP	Legal Services - Ashford Litigation Jun 2025	170.00
11031	T - EFT	07/18/2025	12060 - Preferred Alliance, Inc.	11-20 offsite participants & pre-emp test Jun 2025	166.46
11195	T - EFT	08/15/2025	12060 - Preferred Alliance, Inc.	11-20 offsite participants & pre-emp test Jul 2025	166.46
11008	T - EFT	07/18/2025	15374 - Emily Taylor	Docent Naturalists online enrichment 7/1/25	150.00
11162	P - Printed	08/15/2025	10685 - West Valley Collection	SAO Garbage Service Aug 2025	142.18
11155	P - Printed	08/15/2025	10774 - Langley Hill Quarry	WH trail repairs 6/30/25	140.00
11163	T - EFT	08/15/2025	15228 - A (Plus) Livescan Services	Livescan July 2025	90.00

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Fiscal Year 25-26 EFT: *71.07%*

Payment Number	Payment Type	Payment Date	Vendor Name/Number	Invoice Description	Payment Amount
11124	T - EFT	08/01/2025	10271 - Orlandi Trailer Inc	Running Side Lights for Trailers (8 qty)	86.19
11097	T - EFT	08/01/2025	11042 - County of Santa Clara Office of Sheriff	LiveScan Jun 2025	86.00
11140	T - EFT	08/01/2025	10152 - Tadco Supply	Janitorial Supplies	73.42
11082	P - Printed	08/01/2025	10685 - West Valley Collection	SAO Garbage Service July 2025	71.09
11138	T - EFT	08/01/2025	10143 - Summit Uniforms, LLC	Sew patches on seasonal OST uniforms	70.00
11161	P - Printed	08/15/2025	10146 - Tires On The Go	P131 tire maintenance service 4/8/25	40.00
11077	P - Printed	08/01/2025	11129 - Peterson Trucks, Inc.	SAO Tools for Shop	18.17
				Total of Payments:	**3,687,469.88**

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Abbreviations

A### = Admin Office Vehicle	GP = General Preserve	MR = Miramontes Ridge	SCNT = Stevens Creek Nature Trail
BH = Bean Hollow	HT = Hawthorns	OSMRP = Open Space Maintenance &	SCS = Stevens Creek Shoreline
BCR = Bear Creek Redwoods	HC = Hendry's Creek	OSP = Open Space Preserve	SFO = Skyline Field Office
BMTB = Bear Meadow Trail Bridge	HVR = Hidden Valley Ranch	P### = Patrol Vehicle	SanG = San Gregorio
BG = Butano Grazing	HB = Hosking Barn	P2S= Purisima to the Sea Trail	SG = Saratoga Gap
BIT = Biennial Insp of Terminals	HR = Human Resources	PCR = Purisima Creek Redwoods	SJH = Saint Joseph's Hill
CAO = Coastal Area Office	JR = Johnston Ranch	PIC= Picchetti Ranch	SR= Skyline Ridge
CC = Coal Creek	IPM = Integrated Pest Manageme	PR = Pulgas Ridge	T### = Tractor or Trailer
CL = Cloverdale	LGC = Los Gatos Creek	RR = Russian Ridge	TC = Tunitas Creek
DR = Driscoll Ranch	LGW = Los Gatos Watershed	RR/MIN = Mindego Hill	TH = Teague Hill
DHF = Dear Hollow Farm	LH = La Honda Creek	RSA = Rancho San Antonio	TR = Toto Ranch

Date	Amount	Description
6/25/2025	$14,734.30	Sudden Oak Death UCB grant-monitoring and research
6/5/2025	$9,879.48	Docusign annual payment 4/23/25-4/22/26
6/10/2025	$7,545.25	Equip rentals: mini-excavator 4/28-5/28, roller 4/29-5/29
6/11/2025	$7,117.30	Toto troughs (3 qty), concrete ramps (3 qty)
6/4/2025	$6,000.00	SCC Leadership Academy May 2025-Jan 2026 (4 staff)
6/26/2025	$5,944.75	District wide internet service Jun 2025
6/2/2025	$5,152.43	District wide cell service 4/13/25-5/12/25
6/11/2025	$4,983.48	CAO water storage tank
6/9/2025	$3,859.68	Hotel desks (12 qty)
6/19/2025	$3,000.00	Siena Youth Center Program Partner
6/30/2025	$2,670.23	CRM monthly fee 6/27/25-7/26/25
6/4/2025	$2,406.62	BCS feed Jun 2025
6/23/2025	$2,300.00	Climate Resilient Communities-Youth Partnership Fund
6/13/2025	$2,176.93	Laptop docking station x 10
6/2/2025	$1,976.35	CDFW permit application fee
6/2/2025	$1,919.00	Esri 2-day online instructor training 5/28/25-5/29/25
6/27/2025	$1,510.05	Wildlife capture gear-critter gloves (9 pairs), net w/ pole (3)
6/19/2025	$1,500.00	Youth&Young Adult Outdoor Ed Partner Programming
6/23/2025	$1,500.00	Canopy Youth Partnership Program Fund
6/4/2025	$1,500.00	AO gardening May 2025
6/9/2025	$1,494.29	Stihl brush cutter
6/6/2025	$1,410.10	Lodging-Public Risk Mgmt Assoc Conference 5/30/25-6/4/25
6/9/2025	$1,399.58	Annual volunteer stewards brunch
6/12/2025	$1,350.00	Innovate User Conf Registration (CityWorks) 10/14-10/17-BS
6/5/2025	$1,215.00	Innovate User Conf Registration (CityWorks) 10/14-10/17-BD
6/3/2025	$1,074.72	Service for (8) satellite phones May 2025
6/17/2025	$1,047.36	Hotel desk monitor arms (16 qty)
6/20/2025	$1,021.17	SFO hand towels, TP, disposable gloves, bolts, washers
6/19/2025	$1,000.00	Youth&Young Adult Wellness in the Outdoors event 8/9/25
6/9/2025	$1,000.00	Remove chemical from 250 hats
6/12/2025	$984.00	Security certificate annual subscription renewal
6/23/2025	$946.95	Gordon Ridge water project-plumbing supplies
6/6/2025	$899.99	Stihl equip batteries (3 qty)
6/9/2025	$889.96	Lodging-Visitor Use Mgmt Conference 6/2/25-6/6/25 (1of2)
6/9/2025	$889.96	Lodging-Visitor Use Mgmt Conference 6/2/25-6/6/25 (2of2)
6/27/2025	$849.26	Leadership academy gift-leather portfolio set (18 qty)
6/2/2025	$846.89	Lunch-New Employee Welcome Event
6/20/2025	$826.95	P144 body repair-right rear door
6/4/2025	$825.00	Calpelra Conference 11/19/25-11/21/25
6/30/2025	$813.00	AICP & APA GM Membership Dues
6/4/2025	$804.36	AO waste disposal May 2025
6/3/2025	$789.00	AO alarm services June 2025
6/4/2025	$786.80	Ink cartridges for Plotter (7 qty)
6/17/2025	$783.85	ECdM #C waterline repair/shower supplies
6/3/2025	$780.23	AO water 4/16/25-5/13/25
6/13/2025	$682.50	American Planning Assoc Conference 9/28/25-10/1/25
6/4/2025	$645.00	Preemployment physical, audio test x2
6/25/2025	$635.96	BCS ADA restroom rental 5/2/25-5/29/25
6/25/2025	$635.96	BCS ADA restroom rental 5/30/25-6/26/25
6/6/2025	$635.09	M228 air compressor
6/10/2025	$634.84	AO water heater repair
6/11/2025	$628.77	Pressure washer repair
6/5/2025	$604.58	Parts for stock troughs
6/4/2025	$602.34	Dumpster for BCS site cleanup
6/27/2025	$600.67	Wildlife capture gear-throw nets (3), restraining pole
6/5/2025	$600.00	Nat'l Assoc for Interpretation-Coaching Workshop 9/23-9/25
6/20/2025	$568.32	Leatherman tool for new OST (5 qty)
6/16/2025	$566.66	Web hosting and dev server 6/13/25-7/12/25
6/12/2025	$561.98	IPM microscope
6/30/2025	$539.39	Zoom payment 6/27/25-7/26/25
6/19/2025	$536.95	Van stock-saw, saw blades,screws, nails, misc supplies
6/6/2025	$524.87	Bergman property electrical supplies
6/16/2025	$500.00	Room rental security deposit-refunded in July
6/2/2025	$446.53	SF State GIS course-cancelled, refund in July
6/12/2025	$445.00	Institute for Public Procurement Conf 7/27/25-7/30/25
6/9/2025	$438.58	Lodging-CA Trails & Greenways Conf 4/22/25-4/24/25
6/26/2025	$430.11	Gordon Ridge water project-plumbing supplies
6/5/2025	$425.41	Road flares for patrol vehicles (52 qty)
6/25/2025	$418.40	Legal online subscription May 2025
6/16/2025	$402.66	CAO pressure pump
6/11/2025	$400.00	AO-gardening irrigation repair
6/12/2025	$387.52	Lodging-Wildlife Corridor Working Group 7/8/25-7/9/25
6/4/2025	$385.42	Live stream camera service Jun 2025
6/12/2025	$384.20	DHF water fountain maintenance repair parts
6/30/2025	$383.03	Sketchup software annual renewal
6/2/2025	$382.77	Cordless sander, soldering iron kit, sanding belts
6/24/2025	$375.00	CAPIO video award submission
6/24/2025	$357.18	Service for EOC phones 6/3/25-7/2/25
6/26/2025	$354.25	New toilet for DHF
6/16/2025	$350.00	Stihl equip parts

6/13/2025	$349.98	SignUp.com annual subscription 6/12/25-6/12/26
6/27/2025	$335.18	Wheel chipper 12' cord (2 qty)
6/26/2025	$327.44	Two Portable Privacy Toilets
6/25/2025	$325.00	Cattlefax annual subscription 6/1/25-6/1/26
6/6/2025	$325.00	Job listing for Ecologist III
6/19/2025	$317.60	SFO fence brackets (20 qty)
6/30/2025	$300.00	Remote Admin tool x 6 users 6/29/25-7/28/25
6/13/2025	$296.50	BAAQMD (SFO gas)annual permit renewal 8/1/25-8/1/26
6/23/2025	$290.00	SAO internet service 6/20/25-7/20/25
6/4/2025	$281.00	Legal online subscription 5/3/25-6/2/25
6/20/2025	$278.97	Travel Esri Conference 7/13/25-7/18/25
6/16/2025	$272.02	P115 battery
6/30/2025	$271.88	AED replacement pads (3 qty)
6/16/2025	$265.00	Room rental fee-Supervisor Retreat 6/24/25
6/13/2025	$259.00	VS AO staff recognition lunch
6/18/2025	$253.73	Sears Ranch barbed wire
6/24/2025	$250.16	Legal ad: Ravenswood Bay Trail Pedestrian Gate Project
6/12/2025	$243.77	SFO pole saw, extenders (3)
6/18/2025	$243.23	CESSWI-Inspection Cert Renewal Fee
6/2/2025	$241.68	Coveralls (4 qty)
6/30/2025	$235.83	PTO Drive shaft
6/17/2025	$233.77	CAO door handle and lock set
6/3/2025	$225.00	SFO backup internet service Jun 2025
6/25/2025	$224.89	Lunch for Supervisor Retreat
6/2/2025	$224.65	Work uniform coveralls (4 qty)
6/4/2025	$223.68	Toto trough parts-float valves (3 qty)
6/30/2025	$219.99	FFO and Birdbox internet 6/27/25-7/27/25
6/13/2025	$212.90	Board Dinner
6/13/2025	$212.66	Surge protectors x 10, nonslip mat
6/4/2025	$209.10	Books for staff DEI event (9 qty)
6/23/2025	$208.60	Sears Ranch gate brackets (16 qty)
6/11/2025	$202.00	Learning from the Land (online course) 11/1/25-5/31/26
6/2/2025	$200.00	Job listing for Budget Analyst
6/24/2025	$199.58	CAO water system parts
6/13/2025	$199.00	Job listing for Ecologist III
6/24/2025	$196.30	Surge protectors x 10 units
6/25/2025	$190.96	Midpen field trip refreshments-East Bay Regional Park Dist
6/11/2025	$189.53	Steel stakes (8), wood screws, painters tape
6/9/2025	$185.16	OST/EMO iPad case and mouse (4 each)
6/4/2025	$183.00	DOT physical (1 of 2)
6/11/2025	$183.00	DOT physical (2 of 2)
6/11/2025	$175.86	CAO water pump install plumbing supplies
6/18/2025	$175.78	T74 oil (5 gallons)
6/16/2025	$175.00	Job listing for Ecologist III
6/9/2025	$173.42	SFO saw heads (4), sharpeners (2)
6/12/2025	$171.69	IPM-petri dishes, LED light illuminator
6/17/2025	$170.35	Hosking Barn water 4/26/25-5/23/25
6/20/2025	$169.50	Tool holders (3 qty)
6/19/2025	$166.34	SFO HVAC filters (2 qty)
6/10/2025	$166.22	CAO waterline plumbing supplies
6/6/2025	$165.16	Radar gun replacement part
6/6/2025	$164.17	Snowy plover Instagram ad June 2025
6/16/2025	$160.94	M228 heavy duty air hose reel
6/16/2025	$160.00	Job listing for Ecologist III
6/30/2025	$160.00	EMT Skills Testing
6/12/2025	$159.10	RSA restroom urinal repair kits (4 qty)
6/6/2025	$158.68	Cow tags (49 qty)
6/18/2025	$158.00	Snowy plover Facebook ad June 2025
6/26/2025	$153.79	Stihl equip parts
6/9/2025	$151.04	Pole saw blades (4 qty)
6/10/2025	$150.00	Tick testing
6/27/2025	$150.00	Digital CPR ID cards (20 qty)
6/17/2025	$148.20	EV public charge permit 7/1/25-6/30/26
6/27/2025	$147.60	Work safety boots
6/27/2025	$136.36	SFO light fixture replacement
6/30/2025	$135.92	Flags (2qty) and hanging materials
6/4/2025	$135.26	Poison oak wash (4 packs)
6/19/2025	$135.16	FFO kitchen supplies/coffee
6/9/2025	$134.86	Stihl equip parts
6/25/2025	$134.50	Postage for volunteer items
6/30/2025	$133.50	Hubspot website integration 5/27/25-6/27/25
6/27/2025	$131.20	Poison oak scrub (10 packs)
6/11/2025	$130.88	Employee name tag order (12 qty)
6/11/2025	$130.00	SFO pole saw
6/12/2025	$129.05	SFO poison oak cleanser (1 gal), pre-contact barrier (1 gal)
6/3/2025	$124.94	Windy Hill water 4/12/25-5/9/25
6/6/2025	$123.27	FO house water valve replacement supplies
6/25/2025	$123.12	Hotel desk cable mgmt (12 qty)
6/10/2025	$122.72	CAO water project-plumbing supplies
6/10/2025	$122.48	Hydraulic hose assembly
6/12/2025	$116.91	Thornewood water 4/26/25-5/23/25

6/2/2025	$112.83	Monthly document shred service May 2025
6/9/2025	$109.32	Tractor PTO Shield
6/23/2025	$109.29	Poison oak soap bar (8 qty)
6/6/2025	$108.00	Parking-Public Risk Mgmt Assoc Conference 5/30/25-6/4/25
6/17/2025	$106.09	CoreLogic/RealQuest May 2025
6/10/2025	$100.74	SFO coffee for office
6/23/2025	$100.43	SFO splenda, gatorade, envelopes
6/3/2025	$98.08	Car seat cover, windshield sun shade, poison ivy wipes
6/11/2025	$97.95	Staff appreciation lunch-Grants FEMA work
6/16/2025	$97.36	Cow tags for rangers/vehicles (39 qty)
6/27/2025	$95.22	Nature Center Open Signs (2 qty)
6/11/2025	$94.91	Name badges for volunteers (9 qty)
6/6/2025	$94.66	Safety chain for BCS manure area
6/27/2025	$92.76	District polos for (2) staff
6/19/2025	$85.31	SFO plumbing parts
6/30/2025	$84.85	SAO desk & file sorter, scissors
6/18/2025	$83.96	Donuts for SFO (4 dozen)
6/2/2025	$83.28	Poison oak wipes (4 packs)
6/30/2025	$83.20	Tow straps (2), chainsaw scrench (10)
6/13/2025	$82.75	Fremont Older water repair-plumbing supplies
6/27/2025	$81.81	New rakes for brushing (3 qty)
6/10/2025	$78.45	SAO keys for office, flag pole, mailbox (14 qty)
6/19/2025	$77.56	Windshield wipers/cleaners
6/23/2025	$77.44	Sunscreen (10 qty)
6/18/2025	$76.31	Food for gopher snake
6/2/2025	$75.96	Pride parade equipment rental 5/30/25-5/31/25
6/25/2025	$75.24	FFO closet cleaning supplies
6/3/2025	$75.00	MB campsite pay phone June 2025
6/24/2025	$72.62	AO fire system water June 2025
6/11/2025	$72.54	FFO plumbing supplies
6/30/2025	$70.92	Wildlife capture gear-storage totes (3 qty)
6/16/2025	$70.47	SFO equipment keys (64 qty)
6/11/2025	$70.02	SFO air compressor gauges (4 qty)
6/24/2025	$69.98	SFO key lock boxes (2 qty)
6/6/2025	$69.59	John Deere equipment window cleaner
6/13/2025	$69.44	iPad screen protectors (16 qty)
6/25/2025	$67.96	Pride parade equipment rental 6/21/25-6/22/25
6/18/2025	$67.66	SFO sign brackets (50 qty)
6/18/2025	$66.99	LBV radio case kydex
6/11/2025	$65.10	Natural Curiosity-Indigenous book
6/2/2025	$65.06	P118 gas
6/11/2025	$64.27	SAO office nameplates & signs (5 qty)
6/4/2025	$63.78	FFO misc shop supplies/hardware
6/6/2025	$63.23	Vehicle supplies-straps, storage box, tow hook
6/27/2025	$62.33	Stihl parts
6/24/2025	$61.21	FFO socket set, DEFf fluid (7.5 gal)
6/2/2025	$60.95	Airport to hotel transport-Public Risk Mgmt Assoc Conf 5/30
6/5/2025	$60.91	P118 gas
6/23/2025	$60.49	Multitool, safety vest, stop/slow sign, sunscreen
6/26/2025	$60.45	Tool service tags (pack of 1,000)
6/12/2025	$60.01	Boot inserts
6/19/2025	$60.00	District housing dump run
6/30/2025	$59.85	Wildlife capture gear-wool blankets (3 qty)
6/18/2025	$59.43	P118 gas
6/10/2025	$59.28	PPE-neck gaiter (12 qty)
6/9/2025	$58.54	Volunteer snacks
6/2/2025	$57.32	First aid kits for vehicles (2 qty)
6/4/2025	$57.03	Toto trough parts-float balls (3 qty)
6/30/2025	$56.84	Fly tape (4 packs)
6/13/2025	$56.65	Chainsaw scrench (5 qty)
6/30/2025	$56.50	Wufoo survey software 6/28/25-7/28/25
6/20/2025	$55.82	Picture hanging supplies
6/13/2025	$55.00	Job listing for Ecologist III
6/2/2025	$53.36	VPL cleaning supplies, tools
6/20/2025	$52.87	SFO fence brackets (3 qty)
6/5/2025	$52.85	Hotel to airport transport-Public Risk Mgmt Assoc Conf 6/4
6/27/2025	$52.06	Eyewash (3 qty)
6/17/2025	$50.00	CEQA fee for Pratt acquisition
6/26/2025	$49.64	P118 gas
6/4/2025	$48.24	Toto trough parts-rod for float valves (3 qty)
6/5/2025	$47.65	Storage bins, drinking water
6/10/2025	$46.42	P118 gas
6/16/2025	$46.38	District provided shirt
6/2/2025	$46.00	Coffee for Sudden Oak Death Blitz
6/16/2025	$44.83	SFO poison oak lotion refillable bottles (48 qty)
6/5/2025	$44.79	Treats for volunteer project
6/9/2025	$44.78	Storage bins, containers, bags
6/6/2025	$43.65	ECdM #C shower head replacement
6/23/2025	$43.43	FFO pizza-seasonal crew recognition
6/30/2025	$42.24	P118 gas
6/9/2025	$41.75	Septic hose for trailer

6/16/2025	$40.43	Volunteer project snacks
6/25/2025	$40.33	Shop light, extension cord
6/13/2025	$40.13	Stihl equipment parts
6/3/2025	$40.12	P118 gas
6/27/2025	$40.00	Bay Nature membership 6/26/25-6/25/26
6/25/2025	$39.00	Monthly shopify Jun 2025
6/24/2025	$37.63	UPS-ship part to be repaired
6/16/2025	$37.09	Water treatment-Bean Hollow
6/18/2025	$36.24	FOOSP water conditioning serv June 2025
6/9/2025	$35.45	Volunteer snacks
6/20/2025	$34.96	SAO refreshments, heat day
6/9/2025	$33.83	Storage bins, tablecloth
6/5/2025	$33.69	Equipment glass cleaner
6/4/2025	$33.17	1470 Monte Bello Rd 4/11/25-5/12/25
6/17/2025	$33.17	Uniform-ergonomic duty belt harness
6/27/2025	$33.15	Wildlife capture gear-cadaver bags
6/9/2025	$32.07	FFO plumbing parts
6/16/2025	$31.71	SFO/CAO patrol cabinet locks (2 qty)
6/18/2025	$31.15	Mobile hotspot service 4/21/25-5/20/25
6/30/2025	$30.78	Biomonitoring bags (3)
6/2/2025	$30.78	Vol Project refreshments
6/19/2025	$30.74	T74 oil filters (2 qty)
6/16/2025	$30.50	Parking arrow sign
6/26/2025	$29.95	Hunters education training
6/13/2025	$29.66	Tie downs for hauling items
6/27/2025	$29.51	Computer mouse (2 qty)
6/5/2025	$29.37	Sunscreen (3 qty)
6/9/2025	$29.07	Storage box, bug spray, painters tape
6/23/2025	$29.01	Nametags for volunteer event
6/11/2025	$29.00	Natural Areas Assoc Webinar 6/24/25
6/25/2025	$28.68	CAO water system parts
6/18/2025	$28.36	Vehicle air filter
6/25/2025	$28.35	Water quality monitoring supplies
6/26/2025	$28.35	Extra long hanging folder tabs
6/2/2025	$27.96	SFO/CAO EMS drinking water restock
6/10/2025	$27.27	Outbox trays for LE cabinet
6/30/2025	$27.26	GFOA Conference-taxi from airport to hotel 6/28/25
6/2/2025	$26.96	Bottled water for public in patrol vehicles
6/18/2025	$26.68	SFO sugar for office
6/27/2025	$26.59	Plumbing parts for DHF restroom
6/4/2025	$26.18	Media training snacks
6/25/2025	$26.02	Stock paper for deeds
6/25/2025	$26.00	Mercury News subscription 6/23/25-7/18/25
6/12/2025	$24.76	BCS water lines-plumbing supplies
6/27/2025	$24.73	PL department office supplies
6/13/2025	$24.56	Gasket maker/material
6/24/2025	$24.43	Brown paint for fire sign back
6/27/2025	$24.42	Educational supplies: dry-erase board, name labels
6/16/2025	$23.90	CAO drinking water (5 gallons)
6/26/2025	$22.87	Volunteer snacks
6/16/2025	$22.63	Bergman light installation supplies
6/27/2025	$22.35	SFO shower drain grate
6/19/2025	$22.33	SFO trailer hitch ball (2 qty)
6/18/2025	$21.81	New dead bolt for Bohlman Rd
6/6/2025	$21.47	Volunteer snacks
6/25/2025	$21.09	Monthly shopify shipping fees May 2025
6/11/2025	$20.52	FFO kitchen flatware
6/13/2025	$20.00	Volunteer snacks
6/25/2025	$19.50	Parking in Sacramento for legislative hearing
6/12/2025	$18.73	ABS cap for RV removal at BCS
6/10/2025	$18.63	Electrolyte drink mix
6/24/2025	$18.54	Evidence tags
6/12/2025	$18.03	Mudroom supplies
6/19/2025	$16.55	Rekey lock for Bohlman Rd
6/25/2025	$16.50	Sacramento parking for SB-653 testimony
6/2/2025	$16.38	Emergency water for volunteers
6/12/2025	$16.26	IPM microscopy supplies
6/12/2025	$15.72	Sharpies
6/2/2025	$15.27	Project site stake flags
6/19/2025	$14.60	Postal stamps
6/30/2025	$13.99	Volunteer snacks
6/2/2025	$13.98	Volunteer snacks
6/10/2025	$13.98	SFO coffee creamers
6/3/2025	$13.36	SFO tea for office
6/11/2025	$12.53	Ziplock bags
6/27/2025	$12.11	Cow tags for ranger/vehicles (2 qty)
6/27/2025	$11.99	BoD cloud file storage 6/26/25-7/26/25
6/10/2025	$11.97	Van stock-misc supplies
6/25/2025	$11.48	Board media training: muffins
6/6/2025	$10.93	Screw driver wrench set
6/16/2025	$10.90	Latch for Rhus Ridge property

6/9/2025	$10.68	Hangers for loaner clothes
6/30/2025	$10.67	Volunteer snacks
6/30/2025	$10.00	Service for HR eFax service
6/13/2025	$9.99	Volunteer snacks
6/30/2025	$9.79	Volunteer snacks
6/19/2025	$9.58	Safety chain clip for BCS manure
6/26/2025	$8.99	Volunteer snacks
6/23/2025	$8.98	Volunteer snacks
6/11/2025	$8.20	SAO frame for nameplate
6/25/2025	$7.58	Personal purchase-District to be reimbursed
6/20/2025	$7.19	AO board room door stop
6/5/2025	$7.05	1560 Monte Bello Rd 4/11/25-5/12/25
6/9/2025	$6.19	Water for volunteer project
6/6/2025	$5.99	Volunteer snacks
6/4/2025	$1.50	Parking for Sup. Mueller meeting
6/6/2025	-$3.79	Refund May charge
6/13/2025	-$29.43	Refund error
6/18/2025	-$165.00	Arborist training workshop refund
6/4/2025	-$300.44	Refund for May charge
6/2/2025	-$1,089.07	Return wall oven at Bohlman Rd
	$152,074.66	**Wells Fargo Credit Cards June 2025**

Midpeninsula Regional Open Space District

R-25-112
Meeting 25-24
August 27, 2025

AGENDA ITEM 3

AGENDA ITEM

Authorization to apply for California Hazard Mitigation Grant Funding for the replacement and upsizing of the Bear Creek Redwoods Parking Lot Culvert Mitigation Project

GENERAL MANAGER'S RECOMMENDATION

Authorize the General Manager to sign the required local match commitment letter in the amount of $381,250 to secure $1,143,750 in grant funding from the California Office of Emergency Services Hazard Mitigation Grant Program for the Bear Creek Redwoods Parking Lot Culvert Mitigation project and to negotiate and execute the grant agreement.

SUMMARY

The General Manager recommends that the Board of Directors (Board) authorize the General Manager to sign the required local match commitment letter for the Midpeninsula Regional Open Space District's (District's) application to the California Office of Emergency Services (Cal OES) Hazard Mitigation Grant Program (HMGP). If awarded, the General Manager also recommends authorization to negotiate and execute the grant agreement with Cal OES.

The requested grant funding of $1,143,750, with a District match of $381,250, will replace and enlarge an existing 60-inch culvert beneath the Bear Creek Redwoods Preserve parking lot to realign it with Santa Clara County's connecting culvert infrastructure under Bear Creek Road. Following disaster-related flooding and the formation of a sinkhole in 2023, Santa Clara County (County) completed emergency repairs and upsized their adjacent road culvert from 60 inches to 72 inches. The District's proposed project will help mitigate future flooding emergencies and enhance overall storm resilience at this location.

DISCUSSION

During the severe winter storms of December 2022 and January 2023, the District sustained over $8 million in damage to roads, trails, dams, ponds, culverts, and bridges across multiple preserves in San Mateo and Santa Clara counties. To help offset the substantial repair costs, the Board authorized staff in August 2023 to pursue federal and state disaster assistance, including the Federal Emergency Management Agency (FEMA) Public Assistance Program and the California Office of Emergency Services (Cal OES) Disaster Assistance Act, available through the Presidential Disaster Declaration for the January 2023 storms (FEMA DR-4683-CA).

Among the 29 projects submitted under this declaration was the Bear Creek Redwoods Parking Lot Culvert Replacement. However, on February 6, 2025, FEMA issued a determination memo deeming this culvert project ineligible for funding under the disaster grant.

In response, staff identified the Hazard Mitigation Grant Program (HMGP) as an alternative funding source and successfully advanced the project to the full proposal stage with Cal OES.

Project Need:
The proposed project addresses the District's undersized 500-foot-long culvert beneath the Bear Creek Redwoods Preserve public parking lot, which connects directly to the County's culvert under Bear Creek Road. After the disaster-declared storms caused significant road collapse and a sinkhole in 2023, the County upsized its Bear Creek Road culvert from 60 inches to 72 inches as part of an emergency repair. The District's older 60-inch corrugated metal pipe culvert is not optimally aligned with the County's infrastructure and is no longer sufficient for current and future stormwater flows.

The inadequate culvert capacity during the major storms led to flooding, the collapse of Bear Creek Road, and a six-month closure, affecting more than 8,000 local residents of Lexington Hills and Boulder Creek, who had to use significantly longer alternate routes. The closure also prevented vehicle access to Bear Creek Redwoods Open Space Preserve, which typically welcomes nearly 60,000 visitors annually. The County's emergency repairs alone cost nearly $1.4 million.

A geotechnical assessment completed by the District in April 2023 confirmed that the District's current culvert lacks adequate capacity. Further, a hydrologic and hydraulic analysis completed in August 2023 determined the culvert is undersized for a 25-year storm event and recommended upsizing to a 72-inch diameter to align with the County's repairs and minimize future failures.

As part of the HMGP process, Cal OES requires a minimum 25% non-federal match. The Board is being asked to authorize the General Manager or designee to sign the local match commitment letter, confirming the District's ability to meet this requirement. The commitment letter was generated by the HMGP online system, based on data entered by District staff.

FISCAL IMPACT

Upon review and approval of the HMGP application by the funding agency, CalOES, this funding opportunity would have a positive impact of up to $1,143,750. The District's 25% matching contribution to complete the culvert repair and upgrade work is $381,250.

PRIOR BOARD AND COMMITTEE REVIEW

None

PUBLIC NOTICE

Public notice was provided as required by the Brown Act.

CEQA COMPLIANCE

Submitting grant applications to secure funding is not subject to the California Environmental Quality Act (CEQA). The project has received a Notice of Determination that fulfills the necessary environmental requirements.

NEXT STEPS

If approved by the Board, the General Manager will 1) sign the letter of local match commitment to enable the completion and submission of a CalOES HMGP grant application for the replacement and upsizing of the Bear Creek Redwoods Parking Lot Culvert; and 2) if awarded the grant, review the final grant terms from Cal OES and, if in the District's and public's best interest, enter into a funding agreement and implement the project upon notice to proceed. Should the terms be unfavorable, the General Manager will update the Board on recommended next steps.

Responsible Department Head:
Stefan Jaskulak, Chief Financial Officer, Administrative Services

Prepared by / Staff contact:
Carol Schimke, Grants Program Manager, Administrative Services Department

Midpeninsula Regional Open Space District

R-25-113
Meeting 25-24
August 27, 2025

AGENDA ITEM 4

AGENDA ITEM

Grant Application with the California Wildlife Conservation Board for the Highway 17 Wildlife Undercrossing Project

GENERAL MANAGER'S RECOMMENDATION

Adopt a resolution authorizing the General Manager to apply for up to $13,000,000 in grant funding and negotiate a subsequent grant agreement, if awarded, from the California Wildlife Conservation Board for the Highway 17 Wildlife Undercrossing Project.

SUMMARY

The General Manager recommends that the Midpeninsula Regional Open Space District (District) Board of Directors (Board) adopt a resolution authorizing the General Manager to apply for up to $13,000,000 in grant funding from the Wildlife Conservation Board (WCB) and negotiate a grant agreement, if awarded. This grant would provide critical funding for construction of the Highway 17 Wildlife Undercrossing Project.

DISCUSSION

In alignment with the 2019 update to the Wildlife Conservation Board's (WCB) Strategic Plan, several grant funding sources are available to support projects that achieve one or more of the Strategic Plan's benefits. These benefits include protected or enhanced biodiversity; support of the State Wildlife Action Plan priority habitats; climate change resiliency and connectivity; conserved or enhanced working landscapes; conserved or enhanced water-related projects; and enhanced public access. The Grants Program has identified the Highway 17 Wildlife Undercrossing Project as a project meeting the criteria.

The Highway 17 Wildlife Undercrossing Project would improve wildlife passage at a known roadkill hot spot to safely connect 30,000 acres of protected open space habitat for local wildlife. Mountain lion, American badger and black-tailed deer are targeted mammal species that will benefit from this project. Highway 17 currently blocks wildlife from migrating between mountain ridges for food, mates, and shelter, thus acting as a barrier for genetic diversity among the populations. In fact, concerns regarding the low genetic diversity for mountain lions has led the California Department of Fish and Wildlife to list mountain lions as a candidate species under the California Endangered Species Act within the central coast evolutionary significant unit, which includes the Santa Cruz Mountains. The American badger is already considered uncommon and is listed as a California State Species of Special Concern.

In addition to mountain lions and badgers, many other wildlife are impacted in attempts to cross the highway, including hundreds of deer each year, as well as other native species such as coyote, bobcat, skunk, gray fox, opossum, and reptile and amphibian species. Providing a safe crossing for wildlife will not only significantly reduce wildlife-vehicle collisions that kill wildlife but also increase road safety for drivers along a heavily traveled highway.

The potential funding from this grant opportunity would support the construction of a year-round wildlife crossing under Highway 17. The crossing infrastructure will include 1.7 miles of directional fencing on each side of the highway, masonry sound walls above the undercrossing and running along both shoulders of the road, 23 wildlife escape ramps placed every 500 feet within the fencing area, and deterrents to keep animals from entering the highway at vehicle ingress/egress points where fencing cannot be installed.

This Highway 17 Wildlife Undercrossing Project meets the benefit criteria in the current WCB 2019 Strategic Plan and it aligns with Priority B1.2 in their draft 2025-2030 Strategic Plan, which states: *Each year, invest in at least three wildlife under-or over-crossing projects in locations deemed high priority by both transportation and fish and wildlife agencies.* The project also aligns with local and statewide goals, including the 2019 Santa Clara County Regional Conservation Investment Strategy, which identified the Highway 17 Undercrossing Project as a core area for mountain lion connectivity that can be greatly enhanced as a least-cost corridor compared to other barrier sites. The California Department of Fish and Wildlife (CDFW) also lists the Highway 17 Wildlife Undercrossing among its 12 priority connectivity projects for the state and one of the top two projects for CDFW Region 3-San Francisco Bay Delta Region.

WCB requires a resolution to apply for grant funding from the District's Board prior to reviewing the project and potentially awarding funds up to $13,000,000. The resolution (Attachment 1) authorizes the General Manager or their designee to sign the application for WCB funds and to execute a grant agreement for the funding, if awarded.

FISCAL IMPACT

Upon review and approval by WCB, this funding opportunity would have a positive impact of up to $13,000,000.

PRIOR BOARD OR COMMITTEE REVIEW

None

PUBLIC NOTICE

Public notice was provided as required by the Brown Act.

CEQA COMPLIANCE

Submitting grant applications to secure funding is not subject to the California Environmental Quality Act (CEQA). The WCB requires that grantees comply with CEQA and certify that the CEQA analysis for any project encompasses all aspects of the work to be completed with grant funds.

NEXT STEPS

If approved by the Board, District staff will complete a WCB grant application for the Highway 17 Wildlife Undercrossing Project and the General Manager will submit the grant application to the WCB for consideration. Upon review and approval by WCB, District staff will work with WCB staff to develop a grant agreement for grant funding that the General Manager can execute.

Attachment

1. Resolution of the Board of Directors of the Midpeninsula Regional Open Space District Approving the Application for a Wildlife Conservation Board Grant for the Highway 17 Undercrossing Project

Responsible Department Head:
Stefan Jaskulak, Chief Financial Officer, Administrative Services

Prepared by / Staff contact:
Carol Schimke, Grants Program Manager, Administrative Services

RESOLUTION NO. 25-___

RESOLUTION OF THE BOARD OF DIRECTORS OF THE MIDPENINSULA REGIONAL OPEN SPACE DISTRICT APPROVING THE APPLICATION FOR A WILDLIFE CONSERVATION BOARD GRANT FOR THE HIGHWAY 17 UNDERCROSSING PROJECT

WHEREAS, funds were made available to the Wildlife Conservation Board for the enhancement or restoration of fish and wildlife habitat and for the development of public access facilities for hunting, fishing or other wildlife-oriented recreational uses; and

WHEREAS, Midpeninsula Regional Open Space District intends that the Highway 17 Undercrossing Project will complete construction of a year-round wildlife crossing under Highway 17.

NOW, THEREFORE, BE IT RESOLVED that the Board of Directors of the Midpeninsula Regional Open Space District hereby:

1. Approves the filing of an application for funding from the Wildlife Conservation Board.

2. Certifies the Midpeninsula Regional Open Space District will comply with all federal, state and local environmental, public health, and other appropriate laws and regulations applicable to the project and will obtain or will ensure that the other project partners obtain all appropriate permits applicable to the project.

3. Further commits to the terms and conditions specified in the grant agreement.

4. Authorizes the General Manager or designee as a representative of the Midpeninsula Regional Open Space District to conduct negotiations, execute, submit and sign all documents including but not limited to applications, agreements, amendments, payment requests, and other documents which may be necessary to administer grant funding for the proposed project, except as limited pursuant to Midpeninsula Regional Open Space District policies.

* * * * * * * * * * * * * * * * * * * *

PASSED AND ADOPTED by the Board of Directors of the Midpeninsula Regional Open Space District on August 27, 2025, at a regular meeting thereof, by the following roll call vote:

AYES:
NOES:
ABSTAIN:
ABSENT:

ATTEST:

Zoe Kersteen-Tucker, Secretary
Board of Directors

APPROVED:

Jed Cyr, President
Board of Directors

APPROVED AS TO FORM:

Hilary Stevenson, General Counsel

I, the District Clerk of the Midpeninsula Regional Open Space District, hereby certify that the above is a true and correct copy of a resolution duly adopted by the Board of Directors of the Midpeninsula Regional Open Space District by the above vote at a meeting thereof duly held and called on the above day.

Maria Soria, District Clerk

Midpeninsula Regional Open Space District

R-25-114
Meeting 25-24
August 27, 2025

AGENDA ITEM 5

AGENDA ITEM

Updates to Board Policy 3.10-*District Grantmaking Program*

GENERAL MANAGER'S RECOMMENDATIONS

Consider the following recommendations as supported by the Legislative, Funding & Public Affairs Committee:

1. Adopt three recommended updates to Board Policy 3.10, *District Grantmaking Program*:
    a. Increase the Grantmaking Program award budget from $250,000 to $300,000, with an increased grant award size in each tier: Tier 1 from $25,000 to $30,000 and Tier 2 to $50,000 to $60,000;
    b. Limit the grantee reimbursement period to a maximum of two years to align with the biennial (every two years) Grantmaking Program cycle and the corresponding release of a new Request for Proposals; and
    c. Funding Priority descriptive updates.

2. Adopt an impact statement that *supports early-stage and grassroots initiatives* for inclusion in Board Policy 3.10, *District Grantmaking Program.*

COMMITTEE	**MEMBERS**
☐ Action Plan & Budget (ABC)	☒ Ward 1 – Craig Gleason
☒ Legislative, Funding & Public Affairs (LFPAC)	☐ Ward 2 – Yoriko Kishimoto
☐ Planning & Natural Resources (PNR)	☐ Ward 3 – Jed Cyr
☐ Real Property	☐ Ward 4 – Curt Riffle
☐ Ad-Hoc Committee	☒ Ward 5 – Karen Holman
	☒ Ward 6 – Margaret MacNiven
	☐ Ward 7 – Zoe Kersteen-Tucker

COMMITTEE ACTION

Date: July 15, 2025
Action: Unanimously approved by LFPAC with a 3-0-0 vote.
Item: R-25-98

COMMENTS

LFPAC reviewed and unanimously approved three recommended updates to Board Policy 3.10,

District Grantmaking Program. The Committee was also presented with three options for selecting an impact statement to be included in Board Policy 3.10.

Recommendation 1.a - Increase the Grantmaking Program award budget from $250,000 to $300,000, with an increased grant award size in each tier: Tier 1 from $25,000 to $30,000 and Tier 2 to $50,000 to $60,000

The Committee discussed the potential for increasing the award budget and grant amounts beyond the recommended inflation adjustments. Staff noted that any significant expansion would require additional staffing and would increase the organization's overall workload. The General Manager directed the Grants Department to include at the next Request for Proposals (RFP) a detailed tracking of staff time who assist in reviewing grants to help inform future decisions regarding a potential program expansion. The Committee also reviewed the applicant process in terms of capacity. With the next RFP cycle, Tier 1 applicants (up to $30,000) will only now be required to submit a robust short form version of the current pre-application. Tier 2 applicants will also complete the short-form application followed by the full application if invited.

Recommendation 1.b - Limit the grantee reimbursement period to a maximum of two years to align with the biennial (every two years) Grantmaking Program cycle and the corresponding release of a new Request for Proposals

The recommendation to limit the reimbursement time period was accepted with no additional comments or questions.

Recommendation 1.c - Adopt Funding Priority descriptive updates

The funding priority for Access, Interpretation, and Education (AIE) was originally designed to be an opportunity for new people to experience District preserves as well as learn about the mission by performing work on District lands. While this is still preferred and encouraged, the recommended change does not require that AIE grantee work occur on District land. Instead, it requires that projects without activities on District land incorporate a lesson developed with/by District staff to be included in the grantee's programming that bridges the connection between the program's outcomes and the District's mission and informs participants about access and volunteer opportunities on District lands.

Recommendation 2 - Establish an impact statement for inclusion of Board Policy 3.10, *District Grantmaking Program*

In addition, the Committee considered three options for an impact statement for inclusion into Board Policy 3.10, *District Grantmaking Program*. The Committee unanimously selected the General Manager's recommended Option 2: Support Early-Stage and Grassroots Initiatives to forward to the full Board for consideration.

Grants staff shared why an impact statement was needed in addition to a purpose statement. An impact statement describes the Grantmaking Program's "why". Such a statement helps the District learn how a small grantmaking program can have the most mission-aligned impact in the community as well as creating a shared understanding of value and significance of our investment in grantees.

Grants staff presented three impact statement options, recommending Option 2.

- Option 1: Maximize Reach by Distributing Grants Across a Broad Grantee Base, most closely reflects the current grantmaking experience, supports engagement with a wide range of organizations and communities.
- Option 2 (Recommended): Support Early-Stage and Grassroots Initiatives, supports lower-resourced organizations and/or new initiatives.
- Option 3: Amplify with Supplemental and Gap Funding, helps projects close funding gaps or serve as a matching grant to complete projects.

Grants staff explained that focusing on early-stage and grassroots initiatives (Option 2) positions the District as a catalyzing funder, maximizing the impact of a modest grant budget by helping to launch small-budget, new initiatives and/or prioritizing support for lower-resourced organizations, defined as those with net assets under $1.2 million, excluding land, building, and equipment. This approach advances the grantmaking program's purpose of building nonprofit capacity and ensuring equitable access to funding for groups with limited fundraising ability. It also enables the District to offer meaningful partnership and non-monetary support, such as technical assistance or training, strengthening relationships and organizational health in line with guiding principles. Option 2 aligns with the District's commitment to diversity, equity, and inclusion by reaching lower-resourced, community-driven organizations and fostering broad, regionally inclusive participation. The eligibility structure ensures both grassroots and larger organizations can access support for early-stage work, while ongoing support for established projects is reserved for grassroots groups, reinforcing the focus on capacity building and equity.

Further, staff commented there are two primary disincentives to Options 1 and 3: They do the least to demonstrate the impact of being a small grant maker and the role of the program as a strategy to advance the District's DEI goals, which was identified in the grantmaking program's strategic review as an area of growth for the program. More specifically, the best designed impact for a small grant making program is one where a small grant can make a big difference. This is most likely to occur with new initiatives and/or lower-resourced organizations (Option 2), whereas Options 1 and 3 are overly neutral on the budget size of the organization, project and/or program.

The rationale for using an organization's 'net assets minus the value of land, buildings and equipment' instead of its operational budget to define "grassroots" is that assets provide a more comprehensive view of an organization's financial strength and position. Additionally, staff provided examples of current/recent grantees whose grant funded work aligns with the Option 2 criteria. Lastly, staff confirmed that an impact statement option would not change the types of eligible projects.

ATTACHMENTS

A. July 15, 2025 LFPAC Committee Report (R-25-98)
B. July 15, 2025 LFPAC Draft Minutes

Responsible Department Head: Chief Financial Officer/Director of Administrative Services Stefan Jaskulak

Prepared by: Caitlin Amarillas, Senior Grants Technician, Grants Program
Contact person: Carol Schimke, Grants Program Manager, Grants Program

Midpeninsula Regional Open Space District

LEGISLATIVE, FUNDING, AND PUBLIC AFFAIRS COMMITTEE

R-25-98
July 15, 2025

AGENDA ITEM 2

AGENDA ITEM

Grantmaking Program Strategic Review and Recommendations

GENERAL MANAGER'S RECOMMENDATIONS

1. Forward to the full Board of Directors for consideration and approval three recommended updates to Board Policy 3.10, *District Grantmaking Program*:
    a. Increase the Grantmaking Program award budget from $250,000 to $300,000, with an increased grant award size in each tier: Tier 1 from $25,000 to $30,000 and Tier 2 to $50,000 to $60,000.
    b. Limit the grantee reimbursement period to a maximum of two years to align with the biennial (every two years) Grantmaking Program cycle and the corresponding release of a new Request for Proposals.
    c. Adopt the recommended Funding Priority descriptive updates.

2. Select one of the three options to establish a Grantmaking Program impact statement for inclusion in Board Policy 3.10, *District Grantmaking Program*, and forward to the full Board of Directors for consideration and approval:
    a. Option 1: Maximize Reach by Distributing Grants Across a Broad Grantee Base
    b. Option 2: Support Early-Stage and Grassroots Initiatives --- *RECOMMENDED*
    c. Option 3: Amplify Initiatives with Supplemental and Gap Funding

SUMMARY

The Grants Program manages the Midpeninsula Regional Open Space District's (District) Grantmaking Program (the Program) that was established in 2017. Having completed three grant making cycles, in Fiscal Year 2024-25 (FY25) the Grants team conducted a strategic review of the Program policy and activities to understand its level of success thus far. Seven Areas of Success, and corresponding outcome measures, were evaluated and rated on a scale of one (1) to three (3), where 3 indicates full success. Out of 21 points possible, the Program scored 16.4 with an average score of 2.3 per Success Area. The strengths, with a score of 2.5 or higher, include having a clear purpose (Success Area 1); funding programs and activities that align with annual goals and objectives (Success Area 2); broad diversity among beneficiaries and participants of grant-funded activities, as well as locations of grantee headquarters and services (Success Area 3); and serving as an effective partner to grantees (Success Area 4). Ratings for Success Areas 5 through 7 (Equitability; Awareness among Stakeholders; and Management Systems, respectively) each fall below 2.5.

Based on the findings of the strategic review, the Legislative, Funding, and Public Affairs Committee (LFPAC) is asked to consider four policy updates to forward on to the full Board of Directors (Board) for their consideration and approval:

1. Increase the award budget from $250,000 to $300,000, with an increased grant award size in each tier: Tier 1 from $25,000 to $30,000 and Tier 2 from $50,000 to $60,000.
2. Limit the reimbursement period to two years to align with the biennial award cycle.
3. Adopt updates to the Funding Priority descriptions.
4. Select one of the following options to establish a Program impact statement:
    a. Option 1: Maximize Reach by Distributing Grants Across a Broad Grantee Base
    b. Option 2: Support Early-Stage and Grassroots Initiatives --- *RECOMMENDED*
    c. Option 3: Amplify Initiatives with Supplemental and Gap Funding

Background

Board Policy 3.10, *District Grantmaking Program* (Attachment 1), came into effect in February 2018, replacing the 2007 Resource Management Grant Program. While the policy states that the Program shall be evaluated every three years, and Program staff have made administrative modifications following each of the three grant making cycles to date (such as adopting the use of a pre-proposal step and encouraging applications that advance tribal engagement), this is the first comprehensive assessment.

Because the Grants Program Strategic Plan 2018 – 2021 did not define how grant making success is measured, to guide the strategic review of the Program's effort, following an intensive planning session in November 2024 Grants Program staff developed a measurement framework and outlined a process to answer the following questions:

- What was the Program intended to do?
- Has the Program been successful?
- How is success measured?

To create the framework, staff identified the focal areas, Areas of Success, to be reviewed and the specific measures for each area and then rated those measures on a 1 to 3 scale, with 3 represented being fully successful. The table below shows the framework's seven (7) Areas of Success and the average rating across each area's specific measures of success. The complete framework, showing the individual measure and ratings, is provided in Attachment 2.

Areas of Success	**Ratings** **3=Fully successful** **2=Moderately successful** **1=Not yet successful**
1. Purpose	2.75
2. Organizational goals/objectives	2.75
3. Diversity	2.88
4. Effectiveness	2.5
5. Equitability	2
6. Awareness among Stakeholders	1.5
7. Management Systems	2

Overall, the evaluation of the Program suggests a moderately-high degree of success, with an success rating of 16.4 out of 21 possible points, and an average total score of 2.3. The strengths, with a score of 2.5 or higher, include having a clear purpose (Success Area 1); funding programs and activities that align with annual goals and objectives (Success Area 2); broad diversity among beneficiaries and participants of grant-funded activities, as well as locations of grantee headquarters and services (Success Area 3); and serving as an effective partner to grantees (Success Area 4) in two ways: 1) grantees reported the successful completion of their grant-funded work within the set timeline, and 2) grantees reported receiving support from the District during the application process and timely grant disbursements.

Averaged ratings for Success Areas 5, 6, and 7 (Equitability; Awareness among stakeholders; and Management system, respectively) fall below 2.5, suggesting opportunities for growth.

Findings, analysis and recommendations for each Area of Success and their measures are presented in Attachment 3, *Grantmaking Program Strategic Review*. Of the 23 recommendations, four affect policy and require LFPAC review and concurrence. The remainder are administrative procedural improvements that can be authorized by the General Manager.

The four policy-level recommendations that are presented for LFPAC review are as follows:

1. Increase the Program award budget to $300,000, with an increased grant award size in each tier: Raise Tier 1 to $30,000 and Tier 2 to $60,000.
2. Limit the grant reimbursement period to two years to align with the biennial funding cycle.
3. Adopt updates to the Funding Priority descriptions.
4. Select a recommended option to establish a Grantmaking Program Impact Statement.

Overall, the Program is strong, mission-aligned, and provides value to the communities it serves. There are opportunities for improvement, most at an administrative level with four higher-level policy considerations to improve its overall efficiency and effectiveness and to expand upon its beneficial impact on the community as an integral part of advancing the District's mission.

DISCUSSION

Recommendation 1: Increase the Program award budget to $300,500, with an increased grant award size in each tier

The Program award budget of $250,000 was set in 2017. To adjust for inflation, it is recommended to increase the overall grant award budget to $300,000, based on an annual cost of living increase of 3% over 7 years. It is also recommended to increase the maximum award amounts for each tier, which would also follow the 3% increase over 7 years: Tier 1 would increase from $25,000 to $30,000 and Tier 2 would increase from $50,000 to $60,000.

Recommendation 2: Limit the grant reimbursement period to a maximum of two years to align with the biennial Program grant cycle

Consider aligning the grant term limit with the Grantmaking Program cycle and the corresponding release of a new RFP by revising the current three-year grant reimbursement period to a two-year period. Under the existing policy, grantees may be ineligible to apply for the

next grant cycle if their current project has not yet closed. A two-year grant term would better align with the application timeline, allowing successful grantees the opportunity to reapply in the subsequent cycle. This change would encourage timely and efficient use of grant funds, ultimately supporting more impactful outcomes within a shorter, yet manageable, timeframe.

Recommendation 3: Adopt updates to the Funding Priority descriptions.

Board Policy 3.10 includes descriptions of the three funding priorities. Based on findings from the Program strategic review, updates to the descriptions are recommended as shown below in tracked changes (strike-though and underline).

Access, Interpretation, and Education
Funding for access, environmental interpretation, and education is directed towards facilitating equitable access and broad opportunity for all residents to experience and increase awareness of District lands while fostering an appreciation for open space protection, nature study, and environmental stewardship. ~~Proposals are invited for projects that contribute an understanding and appreciation of our natural systems, restore indigenous knowledge, facilitate opportunities for outdoor engagement and nature-based experiences, or provide nature-based educational and interpretive experiences for children and/or adults.~~ Applications that incorporate activities conducted on District lands, and/or that incorporate District-developed lesson plans that highlight Midpen lands and resource conservation work, are preferred. Agriculture-based environmental education projects, such as those that provide hands-on learning about sustainable farming practices, food systems, or the ecological connections between agriculture and natural habitats, are welcomed. Applicants are encouraged to emphasize if and how the proposal bridges gaps in access, widens equitable participation, supports indigenous communities, or otherwise helps lower barriers to traditionally underserved or under-represented communities. Funding can be used for staff time to create or execute programming, provide transportation to opportunities for outdoor engagement or nature-based experiences, facilitate knowledge of outdoor recreational opportunities, broaden access to the outdoors, engage residents in environmental stewardship activities, etc. Examples of funded project outcomes include, but are not limited to, enhanced environmental literacy; restoration and integration of indigenous knowledge; expanded outdoor engagement in nature; increased community stewardship; improved mental health; bridging participation gaps; and increased motivation for science, conservation, and environmental careers.

Applied Science
Applied Science funding supports ~~proposals will include~~ academic or practitioner science research projects that ~~support~~ inform the protection and enhancement of natural resources on District lands. ~~The purpose of this support is to develop and disseminate information that advances scientific understanding of natural processes. Projects with potential to increase the effectiveness of applied stewardship of resources on District lands will be preferentially considered.~~ Types of projects may include applied academic research or proof-of-concept, ~~with focus areas including~~ on topics such as integrated pest management, species habitat, restoration, or similar topics relating to natural resource management. Faculty at accredited academic institutions must sponsor research-related projects and field research must take place on District lands. Practitioner science projects other than peer-reviewed research may require faculty sponsorship and will be determined on a case-by-case basis. Examples of funded project outcomes include improved scientific understanding of natural processes, and enhanced stewardship effectiveness on District lands.

Network and Partnership Support
To maximize impact and ensure alignment with multi-jurisdictional conservation and recreation goals, the District welcomes grant proposals that help cultivate, sustain, or expand established conservation networks and partnerships. Eligible activities may include facilitation or consulting services, staff time dedicated to network participation, outreach efforts, meeting coordination, and related expenses such as supplies or communication materials. Examples of funded project outcomes include, but are not limited to, enhanced collaboration and resource sharing; strengthened regional conservation strategies; capacity building for a membership-based organization; and more diversified stakeholders.

Recommendation 4: Select an option to establish a Program Impact Statement

Purpose versus Impact

The Program purpose statement (text box) and funding priorities help explain what the Program does, but it does not explain why it matters. That is, a purpose statement sets the direction and intent, while an impact statement demonstrates the tangible difference made as a result of pursuing that purpose.

Not having an impact statement presents various challenges:

Board Policy 3.10, *District Grantmaking Program* identifies that its purposes are to:

1. Support projects that further Midpen's mission;
2. Build the capacity of academic and nonprofit institutions to sustain and grow the conservation field; and
3. Facilitate Midpen's mission and work by building and strengthening partnerships.

- It is possible to speak about the success of an individual grant-funded project but challenging to convey what the District is striving to achieve through its grantmaking.
- It limits the ability to identify specific, measurable outcomes for the Program.
- It makes selecting grantees more challenging by limiting applicants' and reviewers' decision making to only in how the proposed project aligns with one of the funding priorities.

How an Impact Statement Helps

An impact statement:

- Creates a shared understanding of the value and significance of the District's investments in grantees. This is especially true for a grantmaking program, like the District's, with a relatively small award budget distributed across three funding priorities.
- Helps the District understand where and how to achieve the most impact in the community that also aligns with its mission.
- Clarifies criteria for the prospective applicants and in how District reviewers evaluate each proposal, increasing the likelihood of receiving strong applications and reducing the number of poorly-aligned submittals.

Impact Statement Considerations

Small local grant makers, like the District, can play a unique and significant role through its grant making that results in meaningful impacts, as these examples show:

- *Seeding New Projects:* Small or modest size grants often act as the crucial first funding for new initiatives, enabling grassroots organizations and supporting existing

organizations with emerging ideas to launch projects that might otherwise remain unfunded.

- *Leveraging Additional Funding:* Recipients often use small or modest-sized grants to attract or unlock further funding from other sources, multiplying the original investment's impact.
- *Enabling Program Expansion:* Modest grants can help organizations scale up their services, reach more people, or sustain programs beyond the grant period.
- *Empowering Limited-Capital Nonprofits:* Funding can be directed to nonprofits that have limited capital/capacity.

Proposed Impact Statement Options

The following reflects three impact options for the Program. The impact statement is further understood when placed in the context of the Program's purpose and funding priorities:

In support of the District's mission and annual organizational goals, the Grantmaking Program advances applied science, fosters collaborative conservation networks, and expands equitable access to the outdoors with investments that (INSERT impact statement option).

Option 1: Maximize Reach by Distributing Grants Across a Broad Grantee Base
This option reflects the current grantmaking experience. It spreads grant resources across a range of grantees, allowing the District to engage a wide range of organizations and communities. Factors such as the organization's size, longevity of the effort/service/organization, or match funding are not explicitly considered.

Option 2: Support Early-Stage and Grassroots Initiatives ---- *RECOMMENDED*
This option aligns with a strategy to support early-stage initiatives, grassroots organizations (i.e., those with limited capacity), and/or projects that require more modest funding.

- Recommendation rationale: Focusing on early-stage and grassroots initiatives positions Midpen as a *catalyzing funder*, maximizing the impact of a modest grant budget by helping to launch new initiatives and/or prioritizing and advancing the capacity of for lower-resourced organizations (those with net assets under $1.2 million, excluding land, building, and equipment). This approach advances the grantmaking program's stated purpose of building nonprofit capacity and ensuring equitable access to funding for groups with limited resources. It also enables the District to offer meaningful partnership and non-monetary support, such as technical assistance or training, strengthening relationships and organizational health in line with guiding principles. Option 2 aligns with the District's commitment to diversity, equity, and inclusion by reaching lower-resourced, community-driven organizations and fostering broad, regionally inclusive participation. The eligibility structure ensures both grassroots and larger organizations can access support for early-stage work, while support for established projects is reserved for grassroots groups, reinforcing the focus on capacity building and equity.

Option 3: Amplify Initiatives with Supplemental and Gap Funding
This option focuses on helping to close a funding gap or serve as a matching grant, allowing the District to help projects bridge funding shortfalls, unlock other revenue sources, and ensure the completion of high-impact, high-cost projects that might otherwise stall.

As shown in the tables below, each impact is detailed with a goal, strategy implication, intended results and examples of the metrics to inform Program success.

Option 1

Impact	Goal	Strategy Implications	Intended Results	Example Metrics
Maximize Reach by Distributing Grants Across a Broad Grantee Base	Increase the breadth of the District's impact by distributing grants widely to maximize community reach and the diversity of projects	Spreading grant resources across a range of grantees allows the District to engage a wider range of organizations and communities	Encourage a broad spectrum of project types and geographic distribution Strengthen community capacity and foster new partnerships across the service area	Total number of unique grantees funded per cycle Percentage increase in new grantees year-over-year Geographic and demographic diversity of funded projects Number of communities or populations newly reached through grant-funded activities

Option 2

Impact	Goal	Strategy Implications	Intended Results	Example Metrics
Support Early-Stage and Grassroots Initiatives	Increase the number of early-stage initiatives, grassroots organizations, and small-scale projects supported by the District's Grantmaking Program	Aligns with a strategy to support early-stage initiatives and organizations with limited capacity, or specific projects that require less funding	Expand opportunities for new and emerging projects and/or organizations to access funding and build capacity Increase engagement with underserved and underrepresented communities by lowering financial and administrative barriers to entry	Percentage of grants awarded for early stage initiatives Percentage of grants awarded to grassroots organizations Number of projects funded that serve underserved or underrepresented communities

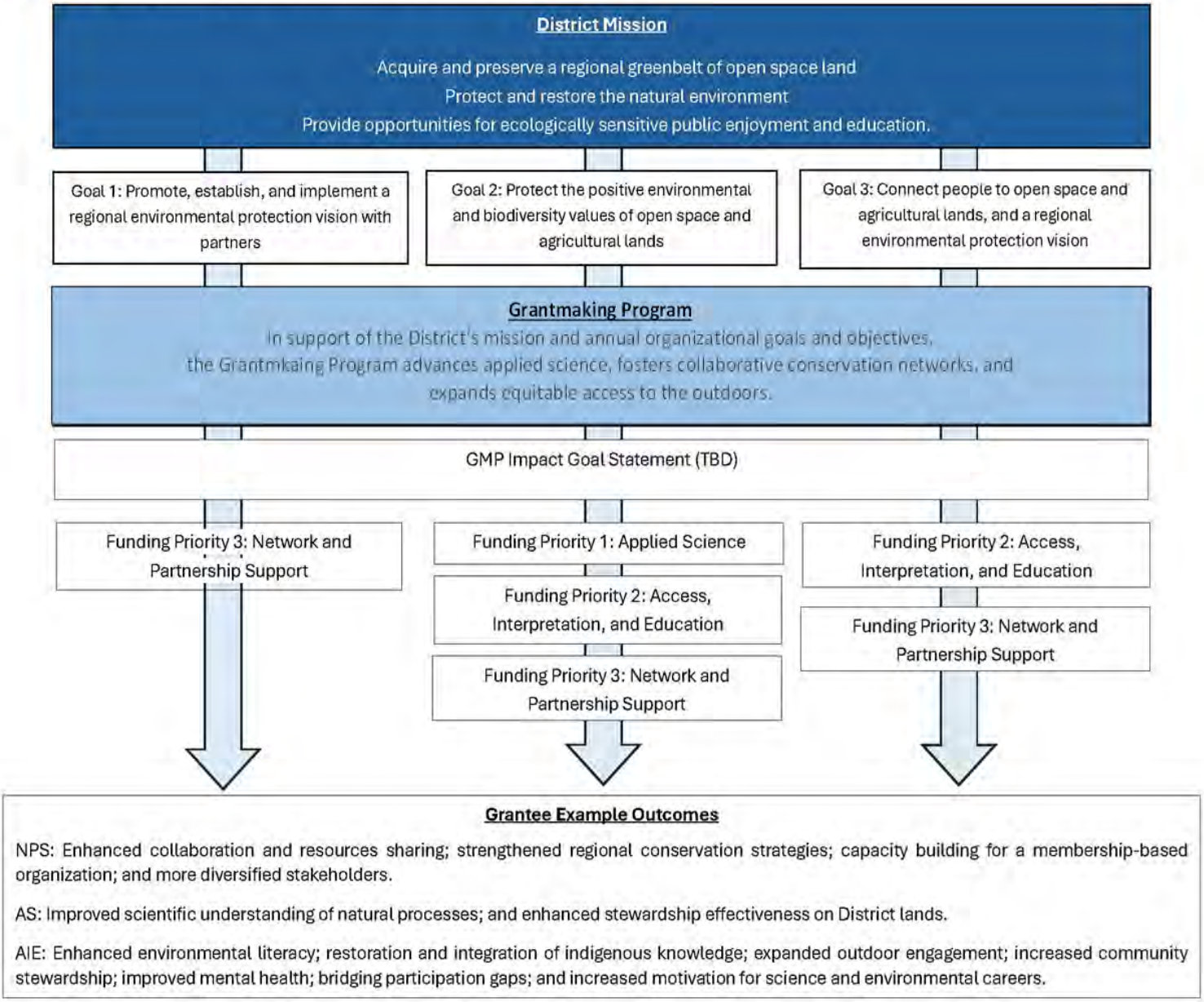
Option 3

Impact	Goal	Strategy Implications	Intended Results	Example Metrics
Amplify Initiatives with Supplemental and Gap Funding	Position the District as a strategic supplemental supporter by prioritizing grants that provide gap funding or matching support, enabling grantees to leverage additional resources and successfully complete projects that align with the District's mission	By focusing on gap and matching grants, the District can help organizations bridge funding shortfalls, unlock other revenue sources, and ensure the completion of high-impact projects that might otherwise stall	Increase the number of projects that successfully secure full funding and reach completion due to the District's supplemental support Strengthen organizational sustainability and capacity by encouraging diversified funding bases among grantees	Percentage of grants awarded as gap or matching funds. Total additional funds leveraged by the District's grants. Number of projects completed that would not have proceeded without supplemental support

Grantmaking Program Alignment with District Mission

The chart below shows how the District's mission and goals are expressed through the Grantmaking Program, including its impact (TBD), funding priorities and prospective outcomes.

Grantmaking Program Alignment with the District's Mission and Goals



Grantee Example Outcomes

NPS: Enhanced collaboration and resources sharing; strengthened regional conservation strategies; capacity building for a membership-based organization; and more diversified stakeholders.

AS: Improved scientific understanding of natural processes; and enhanced stewardship effectiveness on District lands.

AIE: Enhanced environmental literacy; restoration and integration of indigenous knowledge; expanded outdoor engagement; increased community stewardship; improved mental health; bridging participation gaps; and increased motivation for science and environmental careers.

FISCAL IMPACT

The recommended action has no direct, immediate fiscal impact. Future fiscal year budgets will be adopted as part of the Budget and Action Plan process.

PRIOR BOARD AND COMMITTEE REVIEW

February 2018: The Board approved Board Policy 3.10 – *District Grantmaking Program* as a Replacement to the Resource Management Grant Program. (R-18-19, meeting minutes)

PUBLIC NOTICE

Public notice was provided as required by the Brown Act, and an interested party public notice was emailed to the District's current list.

CEQA COMPLIANCE

This item is not a project subject to the California Environmental Quality Act.

NEXT STEPS

If the recommended updates to Board Policy 3.10 are approved by LFPAC, the updates would be brought to the full Board. Pending Board approval of the proposed updates, Grants staff will work to make these updates known to potential grantee applicants as well as make changes to the upcoming RFP. Grants Program staff will also create a system to capture impact goal data. The next Grantmaking Program cycle is scheduled for fall 2025.

Attachments

1. Board Policy 3.10 Grantmaking
2. Areas of Success Framework
3. Report, Grantmaking Program Strategic Review 2.21.25 rev 5.13.25

Responsible Department Head:
Stefan Jaskulak, Chief Financial Officer and Director of Administrative Services

Prepared by/Contact persons:
Carol Schimke, Grants Program Manager, Grants Program
Caitlin Amarillas, Senior Grants Technician, Grants Program

Midpeninsula Regional Open Space District

Board Policy Manual

District Grantmaking Program	**Policy 3.10** **Chapter 3 – Fiscal Management**
Effective Date: 02/28/2018	Revised Date: N/A
Prior Versions: 11/17/2010; 11/14/2007	

Purpose

The purposes of the District's Grantmaking Program are to a) support projects that further the District's mission, b) build the capacity of academic and nonprofit institutions in order to sustain and grow the conservation field; and c) facilitate the District's mission and work by building and strengthening partnerships.

Grantmaking programmatic focus areas

Programmatic priorities
The District's Grantmaking Program will include a broad focus to ensure a range of projects are considered and reflect the diversity of work in which the District engages. Grantmaking will be guided by an emphasis on investments that reflect a regional focus and provide avenues for partnership, both with the District as well as among other stakeholders.

Using these guiding principles, eligible project categories will include proposals focusing on applied science; networks, partnerships; and access, education and interpretation. General grant parameters for each grant proposal category are outlined below, with the grant solicitation providing additional detail for each category.

Applied Science
Research proposals will include academic or practitioner science projects that support the protection and enhancement of natural resources on District lands. The purpose of this support is to develop and disseminate information that advances scientific understanding of natural processes. Projects with potential to increase the effectiveness of applied stewardship of resources on District lands will be preferentially considered. Types of projects may include applied academic research or proof-of-concept, with focus areas including topics such as integrated pest management, species habitat, restoration, or similar topics relating to natural resource management. Faculty at accredited academic institutions must sponsor research-related projects and field research must take place on District lands. Practitioner science projects other than peer-reviewed research may require faculty sponsorship, and will be determined on a case-by-case basis.

Network and Partnership Support
In order to broaden its impact and ensure District priorities are aligned with multi-

jurisdictional conservation and recreation plans, grant proposals that cultivate, sustain, or grow established conservation networks will be accepted. Network or partnership support could take the form of facilitation or other consulting support, staff time for network participation, outreach, meeting supplies, etc.

Access, Interpretation and Education

Funding for access, environmental interpretation and education will be directed towards ensuring equal opportunity for all residents to take advantage of District lands while fostering an appreciation for open space protection, outdoor recreation, and environmental stewardship. The focus will be on funding projects that encourage access to and use of District preserves by all and in creating and executing nature-based educational and interpretive experiences for children and adults. Funding can be used for staff time to create or execute programming, transportation, educational and interpretive programming materials or supplies, facilitate knowledge of outdoor recreational opportunities, access to the outdoors, and environmental stewardship activities.

Grant management and internal controls

Program administration

The Grants Specialist will oversee the grant solicitation, selection, and grant management once selected. Other departments, including Visitor Services and Natural Resources, will be brought in for technical expertise to assist in evaluating proposals through a review committee. Once the grants have been selected, the Grants Specialist will oversee the administrative requirements for grant management, with at least one technical content expert from the relevant department assigned to assist in evaluating grant progress.

Proposal solicitation, selection and due diligence

The District is committed to soliciting proposals from a diverse range of organizations and application solicitations will be broadly disseminated to encourage organizations that reach underserved communities to apply. Additionally, the District will consider past District funding in its scoring criteria in order to increase the competitiveness of organizations that have not previously received District funding.

Eligible grantees will include accredited academic institutions, 501(c)(3) nonprofits, or public entities. Organizations without an IRS-designated status will be eligible for funding if a fiscal sponsorship is established prior to application submittal. A formal evaluation criteria will be used to select proposals for funding, including the organization's ability to administer the grant. Example evaluation categories include the applicant's ability to successfully complete the proposed work in the anticipated timeline and budget, past District funding, fit with District's mission, Board priority, and potential to develop new partnerships.

Grant terms and internal controls

The maximum award for individual grants will be $50,000. The award can be expended as necessary within a three-year grant term, contingent on satisfactory progress on grant objectives. Grants will be administered on a reimbursement basis, with up to 15% available up front if the grantee has a demonstrable need. Grantees will be eligible for reimbursement costs

up until the original grant amount, contingent on satisfactory progress toward grant goals.

Grant applications and reporting
Grantees will be responsible for submitting annual or semi-annual reports that summarize activities and any relevant findings, alongside periodic check-ins with District staff. Additionally, grantees may also be asked to present the grant outcomes to the District staff and/or the Board in addition to formal reporting. Additionally, reimbursement submissions will require expenses to date recorded against the budget, along with invoices and accomplishments and milestones achieved during the reimbursement period.

The application and reporting process will be specific to a) the grant category, and b) the dollar amount awarded. Applications and reporting procedures will have two tiers of requirements (up to $25,000 and up to $50,000). This structure will ensure that smaller grantees are not prohibited from applying due to cumbersome application and reporting requirements in relation to the funding received. Additionally, the District will require that grantees make any acquired data, educational/interpretive materials, or conclusions available to the public. The Board will receive updates on the status of the grants and outcomes through an annual report.

Additional grant requirements and process
- Application solicitations will be released every year or every other year when funding is available and the District Grantmaking Policy will be evaluated every three years and updated as necessary. Grantees will continue to be eligible for additional application cycles, with no funding tenure limit.
- Eligible projects must not result in permanent damage and/or impairment to habitats or natural resources on District lands and will be in compliance with the District's Permit to Enter procedures (required for research projects).
- If indirect costs are costs incurred that do not have directly attributable expenses, they may be charged at no more than 10% of total grant cost. Examples include general and administrative costs, general equipment purchase or maintenance, and salaries and benefits of executive or administrative personnel who may not be directly engaged in the project. Subcontractors are excluded from indirect cost calculations.

Areas of Success Framework

Areas of Success	Rating Scores 3=Fully successful 2=Moderately successful 1=Not yet successful		Success Measures
	AREAS	MEASURES	
1. Purpose	2.75	2.75	Statement exists of what the grantmaking program is designed to do and the priorities for its work.
2. Organizational goals/objectives	2.75	3	A. Grantees address at least one annual goal • Current year goals and objectives explicitly stated RFP • Evaluations of applications based on these goals/objectives
		2.5	B. DEI objectives are explicitly stated; outreach and proposal evaluation take DEI into consideration.
3. Diversity	2.88	2.75	A. Applicants and grantees are distributed across the District's three funding priorities.
		3	B. There is geographical diversity in the location of headquarters, services, and beneficiaries/participants.
4. Effectiveness	2.5	2.5	A. Grantees accomplished all deliverables in time allotted with funding
		3	B. Applicants and grantees respond to questions and reimbursement requests from the grantmaking program staff in a timely manner.
		2	C. District grants build the capacity of grantees
5. Equitability	2	2	A. Funding is multi-year and unrestricted
		2.5	B. Paperwork is simple/streamlined to reduce
		1.5	C. Burden of early-stage vetting is on the funder
		2	D. Processes are transparent & responsive
		2.5	E. Processes include solicitation of feedback
		1.5	F. "Support beyond the check" is provided
6.Awareness among stakeholders	1.5	1	A. Presentations to board/staff by grantmaking program staff and grantees
		2	B. Grant outcomes and/or grantee stories distributed electronically (on website and through newsletters
7. Management system	2	2	A. The grantmaking program data and document management systems and personnel capacity adequately support the program's needs
		2	B. The grantmaking program reflects current industry practices and is comparable to peer organizations.

Grantmaking Program Strategic Review

Prepared by Carol Schimke, Grants Program Manager, and
Caitlin Amarillas, Senior Grants Technician
2/21/2025; rev 5/13/25

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Executive Summary

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Executive Summary

The Board Policy for the Grantmaking Program, (Appendix 1), came into effect in February 2018, replacing the Resource Management Grant Program, which was approved as a Board policy on November 14, 2007. While the Board Policy identified that the Grantmaking Program (GMP) is to be evaluated every three years, this is the first effort to comprehensively assess the GMP.

With the completion of grantmaking cycles in 2019, 2021, and 2023, Midpen sought to understand the cumulative results of each round and how successful it was at accomplishing its purpose. From November 2024 through January 2025, the GMP team undertook a comprehensive study, collecting and analyzing internal and external data, to assess the program's intentions and the degree to which it was successful. This report discusses the findings, analysis, and overall outcomes of this strategic review, and provides program and leadership level recommendations.

Summary by the Numbers: Across the three cycles the GMP received 89 applications and made 22 grants to 18 unique grantees totaling $839,725. The list of all applicants and grantees can be found in Appendix 3. Shown in the table below, there was an increased number of applicants each cycle, growing from 21 to 28 to 40, respectively, with a corresponding increase in the total amount of funding requested.

Totals	**2019**	**2021**	**2023**
# of Applicants	21	28	40
Total amount requested	$762,853	$1,025,35	$1,700,000
# Grantees	7	10	5
Amount awarded	$248,104	$341,852	$249,769

Areas of Success Framework: A framework (shown in the table below) was developed to guide the strategic review, consisting of seven Areas of Success with associated measures. This report discusses each measure's assessment including factual findings and analysis, summarized by an outcome statement and a "success" rating scaled from 1 to 3, where 3 indicates full success.

Overall, the evaluation of the GMP suggests a moderate degree of success, with an outcome rating of 16.4 out of 21 possible points, and an average total score of 2.3. **The program's strengths,** with a score of 2.5 or higher, include **having a clear purpose and funding priorities** (Success Area 1); and **funded programs and activities align solidly with Midpen's annual goals and objectives** (Success Area 2), including the organization's DEI goals. There is also **diversity among the beneficiaries and participants** of the grant-funded activities, as well as the locations of grantee headquarters and services (Success Area 3).

Midpen as an effective partner (Success Area 4) is another area of strength in two ways: 1) Grantees reported the successful completion of their grant-funded work with the provided funding within the

grant period's timeline, and 2) Grantees reported receiving support from Midpen during the application process and timely payments for their work.

Average ratings for Success Areas 5, 6, and 7 (Equitability; Awareness among Stakeholders; and Management System, respectively) fall below 2.5, suggesting opportunities for growth in these areas.

Table: Areas of Success Framework

Areas of Success	Rating Scores 3=Fully successful 2=Moderately successful 1=Not yet successful		Success Measures
	AREAS	MEASURES	
1. Purpose	2.75	2.75	Statement exists of what the GMP is designed to do and the priorities for its work.
2. Organizational goals/objectives	2.75	3	A. Grantees address at least one annual goal • Current year goals and objectives explicitly stated RFP • Evaluations of applications based on these goals/objectives
		2.5	B. DEI objectives are explicitly stated; outreach and proposal evaluation take DEI into consideration.
3. Diversity	2.88	2.75	A. Applicants and grantees are distributed across Midpen's three funding priorities.
		3	B. There is geographical diversity in the location of headquarters, services, and beneficiaries/participants.
4. Effectiveness	2.5	2.5	A. Grantees accomplished all deliverables in time allotted with funding
		3	B. Applicants and grantees respond to questions and reimbursement requests from GMP staff in a timely manner.
		2	C. Midpen grants build the capacity of grantees
5. Equitability	2	2	A. Funding is multi-year and unrestricted
		2.5	B. Paperwork is simple/streamlined to reduce
		1.5	C. Burden of early-stage vetting is on the funder
		2	D. Processes are transparent & responsive
		2.5	E. Processes include solicitation of feedback
		1.5	F. "Support beyond the check" is provided
6.Awareness among stakeholders	1.5	1	A. Presentations to board/staff by GMP staff and grantees
		2	B. Grant outcomes and/or grantee stories distributed electronically (on website and through newsletters
7. Management system	2	2	A.GMP data and document management systems and personnel capacity adequately support the program's needs
		2	B. Midpen's GMP reflects current industry practices and is comparable to peer organizations.

Recommendations Overview

The GMP identified recommendations across the seven Areas of Success. The majority are primarily for consideration at the program level and six are at leadership/policy level. Appendix 2 lists all outcomes and recommendations.

Leadership/Policy Recommendations: Six leadership-level recommendations have been proposed, among which is to develop an impact statement for the GMP. An impact statement is distinct from merely understanding the purpose of the program; it increases a shared understanding of the value and significance of Midpen's investments. Measuring grantmaking impact allows grant makers to identify where and how they can have the most significant effect on the community while aligning with their mission.

Leadership-level recommendations also include considerations to increase the indirect rate allowance, the size of the grant award budget and the amount of individual grant awards. It is also suggested to clarify the funding priority descriptions.

Areas for Improvement: Within the three Areas of Success that fall below 2.5 program-level recommendations include:

- Adoption of practices that increase equitability measures (Success Area 5).
- Improvement in generating greater internal and external awareness of grantees' funded activities and their outcomes (Success Area 6).
- Addressing questions about proposal reviewer capacity; responses to proposals requesting technical support from Midpen staff; and considerations about alignment with industry practices and peer organizations.

An overarching finding highlights that the GMP has previously identified these types of improvements, but the .5 FTE position structure was too limited to fully implement the relevant tasks. With the FY25 expansion of the Senior Grants Technician position from a 0.5 FTE to a 1.0 FTE, many of the related challenges can be better addressed.

Innovation: The GMP strategic review studied if and how the GMP addresses agriculture-based environment education. At this time, analysis suggests that ag-based environmental education aligns with the GMP's funding priority area Access, Interpretation and Education. It is recommended including in the GMP's materials explicit language and project examples in order to generate greater awareness that ag-based environmental education projects and program are aligned with the goals and purpose of Midpen's grantmaking program.

1. Background

Policy Established

The Board Policy for the Grantmaking Program came into effect in February 2018, (Appendix 1), replacing the Resource Management Grant Program, which was approved as a Board policy on November 14, 2007. While the Board Policy identified that it is to be evaluated every three years, this is the first effort to comprehensively assess the Grantmaking Program (GMP).

The Grants Program Strategic Plan 2018 – 2021 did not define a GMP implementation strategy or measures of success against which to assess the three rounds of grant making that have been completed since the GMP's inception. To guide the strategic review effort, following an intensive planning session in November 2024 Grants Program staff developed the GMP Strategic Review Framework.

GMP Strategic Review Framework

The framework outlines a process to answer the following questions.

- What was the GMP intended to do?
- Has the GMP been successful and how is success measured?

There are seven Areas of Success, along with their associated Measures, identified in the framework. The table below highlights the framework and provides an explanation about the purpose of the Success Areas.

Areas of Success, Measures, and Purpose

Areas of Success	Measures of Success	Purpose
1. Purpose	A. Statement exists of what the GMP is designed to do and the priorities for its work.	To understand the broad intention for establishing the GMP.
2. Organizational goals and objectives	A. Goals are incorporated in the application process: ▪ Grantees address at least one annual goal ▪ Current year goals and objectives explicitly stated RFP ▪ Evaluations of applications based on these goals/objectives	To understand how applicants' work align with Midpen's annual goals.
	B. DEI objectives are explicitly stated; outreach and proposal evaluation take DEI into consideration.	To understand how Midpen has incorporated DEI objectives into grantmaking processes.

3. Diversity	A. Applicants and grantees are distributed across three funding priorities.	To understand the extent to which Midpen grants address the breadth of the program's funding priorities, Midpen's jurisdictional reach, and underrepresented groups.
	B. There is geographical diversity in the location of headquarters, services, and beneficiaries/participants.	
4. Effectiveness	A. Grantees accomplished all deliverables in reimbursement period with funding	To understand the extent of grantees success.
	B. Applicant/Grantees received responses from Midpen staff to questions and reimbursement requests in timely manner	To understand grantees' experience working with Midpen.
	C. Midpen grants build the capacity of grantees	To understand Grants Program staff perspectives on the relative robustness of the GMP as an organizational strategy.
5. Equitability	A. Funding is multi-year and unrestricted	These measures (practices), developed by Trust-based Philanthropy Project, provide a lens through which the program can assess its effort to "advance a more just and equitable society by alleviating the inherent power imbalances between funders, nonprofits, and communities." It has not been an expectation that the GMP employ these practices but understanding that there is a spectrum of equitable grantmaking approaches provides a gauge for staff and the Board to consider and adopt these opportunities.
	B. Paperwork is simple/streamlined	
	C. Burden of early-stage vetting is on the funder	
	D. Processes are transparent & responsive	
	E. Processes include solicitation of feedback	
	F. "Support beyond the check" is provided	
6. Awareness among stakeholders	A. Presentations to board/staff by GMP staff and/or grantees	To understand who the GMP 'story' is being told to, how often, and what is being told.
	B. Grant outcomes and/or grantee stories distributed electronically (on website and through newsletters	
7. Management system	A. GMP data and document management systems and personnel capacity adequately support the program's needs	To understand the extent to which the work of the GMP is supported by appropriate resources.
	B. Midpen's GMP is comparable with peer organizations	

2. Data Collection Methods

Measurement data was collected from December 2024 through January 2025 from existing sources (secondary data) and through surveys and interviews (primary data).

Primary Data

- Staff interviews
  - Ana Ruiz, General Manager
  - Stefan Jaskulak, Chief Financial Officer
  - Samantha Powell, previous Grants Technician
  - Jordan McDaniel, inaugural Grants Technician
- Applicant and Grantee Online Survey
  - The survey was sent to 70 applicants and grantees and had a two-week response period; 16 responded (11 grantees and 5 applicants).
    - Current grantee only: 6
    - Past grantee only: 4
    - Past and current grantee: 1
    - Applicant only: 5
  - Most applicants and grantees responding had applied under the Access, Interpretation and Education funding priority. One, an "applicant only", was under Applied Science. Four were under Network and Partnership Support.
  - Among grantees, most (9) were Tier 2 grantees; two were Tier 1 grantees.
- Proposal Reviewer Online Survey was sent to 12 Midpen staff reviewers

Secondary Data

- GMP files, including previous RFPs, evaluation score sheets, grantee reports
- Board reports, policies, and annual goals and objectives
- General collateral, including Midpen website, newsletters

3. Outcomes and Recommendations

Overview of applications and grant awards

- Across the three grantmaking cycles – 2019, 2021, 2023 – the GMP received 89 applications and made 22 grants to 18 unique grantees totaling $839,725. The list of all applicants and grantees can be found in Appendix 3.
- Shown in the table below, there was an increased number of applicants each cycle, growing from 21 to 28 to 40, respectively.
- With the rise in the number of applicants each cycle the total amount being requested increasingly exceeded GMP's $250,000 award budget.
- In 2021, the Board authorized a one-time award budget increase of about $90,000.

Totals by Cycle:

Totals	2019	2021	2023
# of Applicants	21	28	40
Total amount requested	$762,853	$1,025,35	$1,700,000
# Grantees	7	10	5
Amount and % awarded	$248,104	$341,852	$249,769

Areas and Measures of Success

GMP staff developed the *Areas of Success Framework* to guide the strategic review of the grantmaking program. The framework consists of seven Areas of Success with associated measures.

Overall, the evaluation of the GMP suggests a moderate degree of success, with an outcome rating of 16.4 out of 21 possible points, and an average total score of 2.3. The program's strengths, with a score of 2.5 or higher, include having a clear purpose and funding priorities (Success Area 1); and funded programs and activities align solidly with Midpen's annual goals and objectives (Success Area 2), including the organization's DEI goals. There is also diversity among the beneficiaries and participants of the grant-funded activities, as well as the locations of grantee headquarters and services (Success Area 3).

Midpen as an effective partner (Success Area 4) is another area of strength in two ways: 1) Grantees reported the successful completion of their grant-funded work with the provided funding within the grant period's timeline, and 2) Grantees reported receiving support from Midpen during the application process and timely payments for their work.

Average ratings for Success Areas 5, 6, and 7 (Equitability; Awareness among Stakeholders; and Management System, respectively) fall below 2.5, suggesting opportunities for growth in these areas.

The data are presented in this report by Area of Success. Each of the seven Areas of Success sections includes an overall (averaged) outcome statement and rating, an outline of the findings from the data collected, an analysis of those findings, and recommendations that address some or all of the points of the analysis. Appendix 2 lists all seven Areas of Success and their outcomes and recommendations.

Area of Success	Measures of Success
1. Purpose	Statement exists of what the GMP is designed to do and the priorities for its work.

Overall Success Rating: 2.75

Outcome 1: A statement exists that defines the purpose of the GMP and details the priorities for its work and there are overlaps between the GMP's Access, Interpretation and Education funding priority and the Public Affairs Partnership Program that may suggest opportunities for increased collaboration between the programs. Rating: 2.75

Findings

- Board Policy 3.10, District Grantmaking Program identifies that its purposes are to:
    1. Support projects that further Midpen's mission
    2. Build the capacity of academic and nonprofit institutions in order to sustain and grow the conservation field; and
    3. Facilitate Midpen's mission and work by building and strengthening partnerships.
- The policy also identifies three funding priority areas
    1. **Applied Science,** with a focus on academic or practitioner science projects that support the protection and enhancement of natural resources on Midpen lands. The intent is to develop and disseminate information that advances scientific understanding of natural processes.
    2. **Network and Partnership Support,** with a focus on efforts that cultivate, sustain, or grow established conservation networks that are addressing topics related to land management, conservation, or public access to outdoor recreation.
    3. **Access, Interpretation and Education**, focused on facilitating equitable access and broad opportunity for all residents to experience Midpen lands while fostering an appreciation for open space protection, nature study, and environmental stewardship.
- The strategic review found several areas between the Public Affairs Outreach Partnership Program and GMP's Access, Interpretation, and Education (AIE) funding priority that create some confusion. The table below compares the key attributes of the Outreach Partnership Program and the AIE funding priorities.

Comparative Measure	Outreach Partnership Program[1]	Funding Priority: Access, Interpretation and Education
Purpose	Expand environmental educational programs to reach underserved communities and provide opportunities to community partners to conduct their educational and enrichment outings and events on Midpen preserves funded by Midpen.	To facilitate equitable access and broad opportunity for all residents to experience Midpen lands while fostering an appreciation for open space protection, nature study, and environmental stewardship. Services to

[1] Outreach Partnership Program Memo (9/13/2024)

		under-represented communities are encouraged.
Award Budget	$122,000 annually	$250,000 bi-annually
Funding structure	Tier 1: Stipend Tiers 2 & 3: Contract, non-competitive	Reimbursable grants, competitive
Funding length and levels	Funding is annual o Tier 1: $2,500 o Tier 2: $5,000 - $20,000 o Tier 3: $44,000	Grants can be for 1 – 3 years o Tier 1: Up to $25,000 o Tier 2: $25,000 - $50,000
# of Organizations supported	11 o Tier 1: 4 o Tier 2: 6 o Tier 3: 1	5-7 o Award levels vary; in 2023, all grants were $50,000 and five grants were awarded.
Target organizations	Nonprofit organizations	o Nonprofit organizations o Academic institutions, including K-12 schools, colleges, and universities o Fiscally sponsored programs
Activity types	Outings/events	Projects and programs, inclusive of outings/events
Scope of work	Developed in collaboration with Midpen	Not developed in collaboration with Midpen
Results reported	Outputs	Outputs and outcomes (the latter if proposed by the grantee)

Analysis of Findings

- **Interviews with leadership:** To help analyze, at a high level, the success of the program as it relates to its purpose and priorities, GMP staff conducted interviews with General Manager Ana Ruiz and CFO Stefan Jaskulak. The following summarizes those conversations:

  Successes

  - **Partnerships**: The partnership benefit that the program provides to Midpen was noted as the most important outcome of the program; it is a "bridge to connect Midpen with new and existing partners" and through this "Midpen expands its impact."
  - **Community engagement**: It has created connections with communities that were previously challenging to engage with and has provided a platform for smaller organizations to contribute to Midpen's goals.
  - **Research support**: The program has catalyzed additional research benefiting both Midpen and other land managers.
  - **Enhanced visibility**: Grantee activities have increased Midpen's visibility in the region.

  Areas of Improvement

  - **Long-term partnerships**: The program has not consistently resulted in lasting support or partnerships beyond individual grant periods.
  - **Mutual learning**: There's potential to enhance the program by facilitating presentations to the board.
  - **Funding priorities**: Questions have been raised about the relevance of the Network and Partnership Support priority, suggesting a need for modification or better outreach.
  - **Academic outreach**: There's a need for improved outreach to academic institutions for the Applied Science priority.
- **Measuring impact:** There should be a shared understanding that the *purpose* of the GMP is distinguished from understanding its *impact*, i.e., the value and significance of Midpen's investments. Measuring grantmaking impact helps grant makers learn where and how they can have the most impact in the community that also aligns with its mission.
  - The Board Policy does not provide guidance on the kind of impact envisioned for its grantmaking (see 4.C. for discussion).
  - Grantees have not been required to articulate the near-term outcomes of their funded programs.
  - With an award budget of $250,000 distributed across three funding priorities every two years, it is challenging to draw inferences or conclusions about impact without an impact statement.
- **Overlaps with Outreach Partnership Program**: The board has identified two strategies to engage underrepresented constituents in Midpen preserves: the Public Affairs Outreach Partnership Program (OPP) and the Grant Making Program (GMP).
  - **OPP:** Targets nonprofit organizations, collaboratively developing a specific scope of work focused on outings/events. The process is prescriptive and less competitive, with Public Affairs identifying and inviting nonprofits to partner with. Reporting is simple, involving participant counts, event descriptions, and a brief survey.
  - **GMP:** Conducts broad outreach, soliciting funding proposals from organizations, and offers support through workshops and consultations. Nonprofits propose their own scopes of work, which are reviewed by a panel. The process is competitive, involving a detailed reimbursement procedure and thorough reporting on deliverables.

  Key differences lie in the selection and reporting processes, with OPP being less competitive and more prescriptive, while GMP requires a more detailed and competitive application and reporting process.

  Key overlaps include organizations served, purpose, budget, funding levels, and results.

  - **Organizations served:** Both programs serve environmentally-focused nonprofit organizations.
  - **Purpose:** Both programs (specifically GMP's Access, Interpretation and Education funding priority) share the purpose to support environmental learning and enrichment particularly for populations who are not traditional users of Midpen preserves.

- **Budgets:** OPP's budget is $122,000 annually and in practice, GMP's budget is $250,000 every other year.[2]
- **Funding levels:** Funding levels for both programs are on par: up to $25,000 and $20,000 for GMP's Tier 1 and OPP's Tier 2, respectively; and up to $50,000 and a flat $44,000 for GMPs' Tier 2 and OPP's Tier 3, respectively.
- **Results**: Both programs expect activity output reports (counts of people served, events held, etc.); neither program requires outcome reports (the change that occurred as a result of the funded activities.

Sustaining two programs with similar structures demonstrates Midpen's strong commitment to supporting under-represented communities. However, the effort required by external GMP stakeholders to secure funding comparable to OPP is considerably more. There is also a higher demand of internal resources to identify, engage, and manage grantees—all for outcomes that are not notably distinguishable from those achieved by the OPP program.

Recommendations:

- Utilize the LFPAC study session to discuss
  - A GMP impact statement
  - Approaches that enhance the "comparative advantage" of the GMP, such as higher grant award levels and funded activity outcomes.

Areas of Success	Measures
2. Organizational goals/objectives	A. Grantees address at least one annual goal i. Current year goals and objectives explicitly stated RFP ii. Evaluations of applications based on these goals/objectives
	B. DEI objectives are explicitly stated; outreach and proposal evaluation take DEI into consideration.

Overall Success Rating: 2.75

Outcome 2.A. – The GMP's three funding priority areas address nine organizational objectives across three organizational goals. Grantees are solidly aligned with Midpen's goals and objectives. Grantees' funded activities most frequently support the objectives of Goal 3, "Connect people to open space and agricultural lands, and a regional environmental protection vision." Rating: 3

Findings

- Each RFP included a link to Midpen's mission and to current fiscal year Strategic Plan goals and objectives, as well providing an outline of the scoring categories, which includes assessing how well a proposal aligns with Midpen's mission and goals and advances the applicable funding

[2] As stated in the 2019 board report establishing GMP policy, Requests for Proposals will be issued every year or every other year, depending on staff time and budget available for the program. To date, RFPs have only been issued bi-annually.

priority (applied science; network and partnership support; or access, interpretation, and education).

- The table below shows the FY25 Strategic Goals and Objectives that align with the three funding priority areas and the number of grantees who identified that their grant-funded activities address those.[3] It does not appear that the board has been routinely apprised of grantees' alignment with the goals and objectives; GMP presentations to the board have not included this information.

FY25 Strategic Plan Goals & Objectives	GMP Funding Priority Alignment	# of 2021 and 2023 Grantee alignment with objectives[4]
Goal 1 – Promote, establish, and implement a regional environmental protection vision with partners		
Objective 1 – Continue implementation of the District's Vision Plan and communicate progress on projects…		
Objective 2 – Build and strengthen diverse partnerships to implement a collaborative and science-based approach to regional environmental protection.	• Network and Partnership Support	3
Objective 3 – Take a leadership role in advocating for environmental protection goals…		
Objective 4 – Preserve and connect open space and agricultural lands of local and regional significance		
Goal 2 – Protect the positive environmental and biodiversity values of open space and agricultural lands		
Objective 1 – Take a regional leadership role in promoting the benefits of open space	• Access, Interpretation, and Education • Network and Partnership Support	
Objective 2 – Protect and restore the natural environment to preserve healthy natural systems and implement wildlife corridors to preserve healthy natural systems and biodiversity	• Access, Interpretation, and Education • Applied science • Network and Partnership Support	1
Objective 3 – Lead by example to reduce the impacts of climate change…		

[3] Each year, the board reviews and generally makes minor adjustments to the annual goals and objectives. For ease of cross-year comparison, this exercise refers only to the most recent fiscal year goals and objectives.
[4] In the inaugural grantmaking cycle, grantee applications did not identify alignment with objectives

Objective 4 – Work with fire agencies and surrounding communities to strengthen the prevention of, preparation for and response to wildland fires for enhanced ecosystem resiliency and public safety	• Network and Partnership Support	1
Objective 5 – Support the viability of sustainable agriculture and protect the character of rural communities	• Access, Interpretation and Education	0
Goal 3 – Connect people to open space and agricultural lands, and a regional environmental protection vision		
Objective 1 – Engage the public in realizing the benefits and responsibilities of a regional environmental protection vision to further the District's achievements in protecting open space and agricultural lands	• Access, Interpretation and Education	3
Objective 2 – Implement diversity, equity, and inclusion (DEI) strategies to build and strengthen partnerships, increase broad and inclusive public outreach and engagement, engage tribal groups in the District's work, and instill DEI values across all levels of the organization	• Access, Interpretation and Education • Network and Partnership Support	4
Objective 3 – Expand opportunities, including multimodal options, to equitably connect people to their public open space preserves and enhance the visitor experience in balance with the protection of natural resources	• Access, Interpretation and Education	5
Objective 4 – Develop strategies to reflect the diverse communities we serve in the District's visitors, staff, volunteers, and partners.	• Access, Interpretation and Education • Network and Partnership Support	3
Goal 4 – Strengthen organizational capacity and long-term financial sustainability to fulfill the mission.	• Network and Partnership Support	2

Analysis of Findings

- Most grantee applications explicitly identified how their proposed work aligned with one or more Midpen goals and objectives.
- All proposals selected for awards received highest ratings for alignment with Midpen goals.
- The majority of grantees identified alignment with Goal 3 objectives.

Recommendations

- When recommending grant awards to the board, include a brief analysis about how grantees align with and support Midpen's strategic goals and objectives.

Outcome 2.B. - DEI objectives have been explicitly identified/referenced for the GMP and within the most recent RFP. Consideration of DEI in outreach and evaluation of proposals are present but limited. Rating: 2.5

Findings

- **DEI and Organizational Goals:** In FY25, Midpen maintained a DEI-related goal and objective: *Goal 3, Objective 2 – Implement DEI strategies to build and strengthen partnerships, increase broad and inclusive public outreach and engagement, engage tribal groups in the District's work, and instill DEI values across all levels of the organization.*

  There are two references that align the GMP with Goal 3, Objective 2:

  1. The GMP Board Policy 3.10 (2/28/2019): *The District values diversity and encourages residents of all socio-economic backgrounds to enjoy their public preserves. The District also focuses on developing partnerships with organizations that help welcome and excite diverse and underserved residents to experience their preserves. Consequently, the District will be committed to soliciting proposals from a diverse range of organizations. Application solicitations will be broadly disseminated with the assistance of groups that hold connections to underserved audiences, such as the Silicon Valley Community Foundation.*
  2. Midpen's DEI webpage: There is a statement that identifies the GMP as one strategy by which Midpen seeks to provide for all members of our community "opportunities to engage in the healing power of nature in our public open space lands."
- **DEI and the RFP**:
  - The RFP requires applicants to explain in their proposal how their projects align with one of the goals and objectives in Midpen's current fiscal year Strategic Plan, which includes the DEI goal and objectives.
  - In 2023, across all three funding priorities, the RFP included updated language and example projects intended to improve an applicant's understanding of Midpen's interest in supporting projects that addressed DEI barriers in general and explicitly identifying native groups (see sidebar). Previous RFPs omitted specific mention of supporting Indigenous communities.
- **DEI and Outreach**: The outreach plan in 2023 involved the same methods used in 2021.[5] All

Updated RFP Language:

Applicants are encouraged to emphasize if and how the proposal bridges gaps in access, widens equitable participation, supports indigenous communities, or otherwise helps lower barriers to traditionally underserved or under-represented communities.

Example Project:

Support for forums, site visits, and other convenings for capacity building for indigenous knowledge, revitalization of Native American land management practices, and related partnership development

[5] Outreach included direct notifications to partners, announcements for the GMP webpage, a press release, a Public Affairs managed e-news article and social media posts. GMP staff also hosted a proposal workshop.

outreach was in English. On the webpage, Spanish interpretation services were offered, noted in Spanish at the bottom of the page.

- **DEI and Proposal Evaluation:** The 2023 proposal scoring criteria included an "Engagement" guideline to evaluate a project's ability to "reach underserved communities, broaden the range of organizations served by Midpen, has strong public support and/or was developed with widespread community participation, or involves one or more partner agencies or organizations."

Analysis of Findings

- With the revised language and inclusion of example projects, the GMP has made strides to reflect Midpen's expectation that it serves as a bridge to groups that may not traditionally seek funding from a public agency and/or that serve individuals or groups that are underrepresented users of Midpen's preserves.
- Proposal reviewers had limited guidance to evaluate submissions from a DEI perspective; the criteria were very broad and it was not consistently clear if/when a proposal was noted to align with Midpen's DEI-related Goal 3, Objective 2.
- Despite limited DEI-explicit outreach and proposal evaluation, in the 2023 grantmaking cycle the majority of proposals submitted had 'elements of engagement' with people of color or socioeconomic disadvantaged groups.
    - Three proposals served tribal groups, one of which was, for the first time, from a tribal group. Midpen funded the three proposals serving tribal groups.

Recommendations

- Continue to include the revised language and example projects to highlight the types of projects Midpen is interested in supporting.
- Make available on-demand written material in Spanish and other languages as applicable.
- Make readily visible the availability of interpretation services; ensure easy accessibility.
- Conduct outreach to networked organizations, such as the members of the Environmental Education Funders Collaborative, that reach organizations with which Midpen does not have direct connections.
- Provide clear guidance to proposal reviewers for assessing DEI-elements of a proposal; consider a specific DEI-related scoring criterion.

Area of Success	Measures of Success
3. Diversity	A. Applicants and grantees are distributed across the program's three funding priorities.
	B. There is geographical diversity in the location of headquarters, services, and beneficiaries/participants.

Overall Success Rating: 2.88

Outcome 3.A. – Midpen applicants and grantees have been largely distributed across the three funding priority areas, but only the Access, Interpretation and Education funding priority areas has had a grantee every cycle. Rating: 2.75.

Findings

- Applicants identify the funding priority area they are applying to in their applications. There were applications received in all priority areas across all cycles. The table below shows the number of applicants and grantees by priority area.
- Applicant Data
    - The most common priority area each cycle was Access, Interpretation and Education (AIE); the number of applicants grew each year from 14 in 2019, to 17 in 2021, to 27 in 2023.
    - Applied Science (AS), while there were significantly fewer applications in this priority area than AIE, it was the second most common in 2019 and 2021, and the least common in 2023.
    - There were few Network and Partnership Support (NPS) applications in 2019 and 2021; the number tripled in 2023.

Table: Number of Applicants and Grantees by Funding Priority Areas

Funding Priority Areas	# of Applicants				# of Grantees			
	2019	2021	2023	Total by Area	2019	2021	2023	Total by Area
Access, Interpretation, and Education	14	17	27	58	4	6	3	13
Applied Science	5	8	4	17	2	4	0	6
Network and Partnership Support	2	3	9	14	1	0	2	3
Total by Year	21	28	40		7	10	5	

- Grantee Data
    - Most grants were awarded each cycle to AIE applicants (4, 6 and 3 respectively). AIE was the only priority area with grants awarded each cycle.
    - AS grants were made in 2019 (2) and 2021 (4).
    - NPS grants were made in 2019 (1) and 2023 (2).
    - Across the 22 grants awarded three grantees, San Francisco Bay Bird Observatory (SFBBO), Vida Verde Nature Education, and Saved by Nature each received more than one grant.
        - SFBBO: 3 awards (two in 2019 and one in 2021).
        - Vida Verde Nature Education: 2 awards (one each in 2019 and 2021).
        - Saved by Nature: 2 awards (one each in 2021 and 2023).

Analysis of Findings

- Based on interviews from leadership, there is a sense that that NPS funding priority may be missing the mark; there are questions about whether it is relevant enough, or that the evaluation criteria is not well aligned and/or more outreach is needed to generate greater awareness of the opportunity.
- Interviews with leadership, and anecdotal insights from Natural Resources department staff, suggest that the low number of applicants to the AS funding priority is due to the size of the grants and/or too limited of an outreach plan.

Recommendations

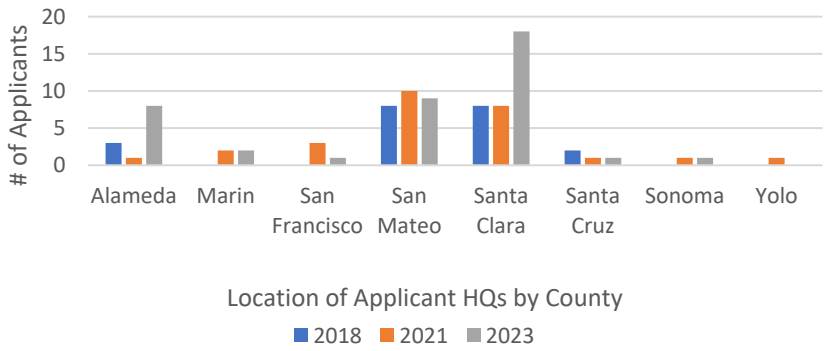
- Utilize the LFPAC study session to review descriptions of all three funding priorities.
- To improve outreach to AS application prospects, engage university Foundation Relations offices and survey them about grant size implications.

Outcome 3.B. – The geographic locations of Midpen applicants and grantees have been largely diverse. Rating: 3

Findings

- Across 89 Applications: Locations by Headquarter.
    - Exhibit 1 shows the location and number of applicant headquarters by county across the three grant cycles. In 2021, applicant headquarters spanned the most counties (8); applications were received from applicants in seven and four counties in 2023 and 2019, respectively.

Exhibit 1 - Locations of Applicant Headquarters by County Each Cycle

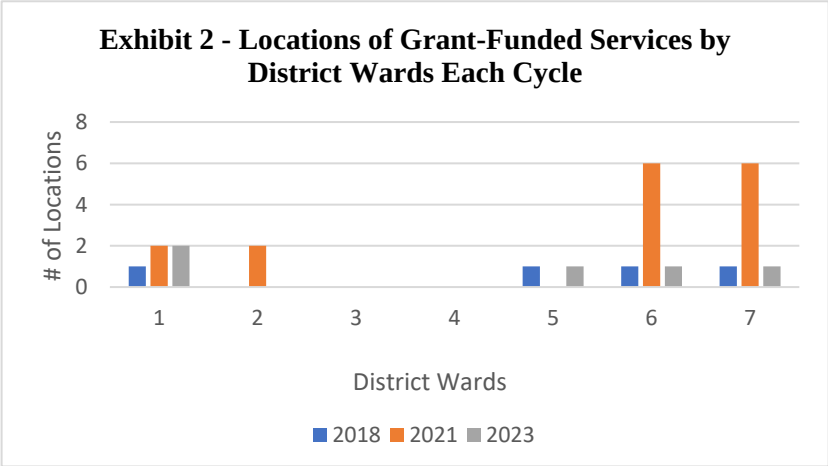


- Across 89 Applications: Locations of Headquarter by City.
    - Applicant headquarters were located in 13 cities:

Berkeley	Half Moon Bay
Campbell	Los Gatos
Davenport	Milpitas

Palo Alto	San Gregorio
Pescadero	San Jose
Redwood City	San Rafel
	Santa Cruz

- Across 22 Grants: Location by Service Delivery.
    - The locations of services delivered varied significantly. A given grantee may have multiple delivery sites.
    - On the Coast: Seven grant-funded projects conducted services at specific locations on the San Mateo coast: Half Moon Bay, Pescadero, San Gregorio, and Tunitas Creek Beach County Park. Other locations included Los Gatos, East Palo Alto, and San Mateo County, and more generally across Midpen Preserves.
    - By Ward: Exhibit 2 shows, by District Ward, where grant-funded activities took place each grant cycle. Appendix 4 is a map of the seven wards.



- Across 22 Grants: Beneficiaries/participants locations.
    - Most grant-funded activities served beneficiaries/participants sourced from a variety of locations in the Bay Area. A few served beneficiaries/participants from specific location, which included East Palo Alto, San Jose, Half Moon Bay, and Pescadero High School.

Analysis of Findings

- The geographies (headquarters, service and beneficiary locations) were diverse across each cycle, which reflects the solid execution of RFP guidelines that state that pre-proposals and full proposals reviews will take under consideration, among other factors, “balance/distribution of funds by geographic area…”.
- For field-based activities, the RFP guidelines state that they must be conducted within Midpen preserves, and projects that involve transportation costs for bringing participants to activities must be to and from activities on Midpen preserves.
    - A few proposal reviewer survey respondents commented having confusion about the requirement to conduct activities on Midpen land.

  - Only the full proposal asks for specific location of services.
- The data suggests that there was an improved outreach plan implemented that helped to diversify the pool of applicant prospects across the grant cycles.
- By wards, there has been less diversity, which reflects that Midpen preserves are predominately in Wards 6 and 7.
- The location of most beneficiaries/participants of grant-funded activities has been varied, but the data was not sufficient or accessible to determine how diverse the locations were.

Recommendations

- Continue to diversify the pool of applicants, review and refresh the outreach plan, identifying new communication platforms, especially in person and on the coast.
- Incorporate into the pre-proposal form an explicit request to identify the location(s) of the proposed activities.
- Clarify and/or confirm the RFP requirement that grant-funded *field* services be conducted on Mipen's preserves and communicate to proposal reviewers.

Area of Success	Measures of Success
4. Effectiveness	A. Grantees accomplished all deliverables in reimbursement period with funding
	B. Applicant/Grantees received timely responses from Midpen staff to questions and reimbursement requests
	C. Midpen grants build the capacity of grantees

Overall Success Rating: 2.5

Background: Midpen awards grants on a reimbursable basis.[6] Whenever a grantee submits a request for payment, the grantee also submits an Approved Work Plan progress report, including an actuals-to-budget expenditure report,. Tier 2 grantees, those with awards over $25,000, must also submit an annual report by June 30 and include responses to four prompts listed in the Reimbursement Requirements attachment to their grant agreement.

Outcome 4.A. – Midpen grantees have accomplished their Approved Work Plan within the project budget, but the information is incomplete. Rating: 2.5

Findings

- Across the 22 funded projects/programs no funding has been withdrawn from any grantee to date due to work plan non-completion or other non-compliance conditions.

[6] Grantee may request up to 15% of the award up front.

- As part of every Approved Work Plan, in addition to grantee-identified tasks, are Midpen-identified "Project Deliverables":
    - Provide project photos and necessary photo releases.
    - Provide meeting agendas or summary of events and attendance numbers for all events that took place during the grant period.
    - Following project completion, give a presentation to Midpen's Board of Directors on project outcomes.
- While confirming the fulfilment of the first two deliverables for all grantees is not feasible for this strategic review, GMP staff has assessed that no grantee to date has presented to the Board (see Outcome 6.A for details on board presentations).

Analysis of Findings:

- **Compliance:** The finding that no grant funding has been withdrawn means that no grantee met a condition that could result in a loss of funding, as outlined in the RFP (see sidebar).
- **Outcomes:** It is not always clear what changes occurred as a result of the grant-funded activities. **Understanding both the quantity and quality of** grantees' accomplishments would help tell the complete story about what was accomplished and how those accomplishments contribute to Midpen's strategic goals and objectives.
- **Opportunity:** Since launching, the GMP has consistently grown and adapted, and this strategic review recommends additional refinements. This is an ideal time to consider incorporating an impact statement and measurements for future grant making cycles to support the further development of the GMP.
- **Challenge:** Currently, all grantee data is stored as files in SharePoint. Not having a grant award management structure makes it impracticable to comprehensively assess grantees' work plan accomplishments (see Outcome 7.A. for details).

Loss of Funding Conditions

Grantee fails to obtain a grant agreement.

Grantee fails to complete the funded project (conform substantially to the agreement).

Grantee fails to submit all documentation within the time periods specified in the grant agreement.

Grantee fails to secure environmental clearance to comply with the California Environmental Quality Act (CEQA) or other necessary project permits.

Grantee changes the project scope without the concurrence of Midpen.

Grantee terminates the project by written notice 30 days in advance.

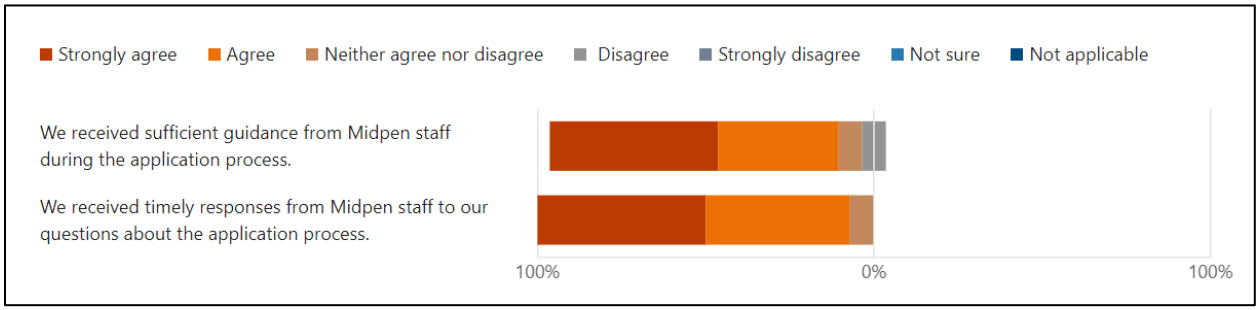
Recommendations

- Utilize the LFPAC study session to discuss grantmaking impact.

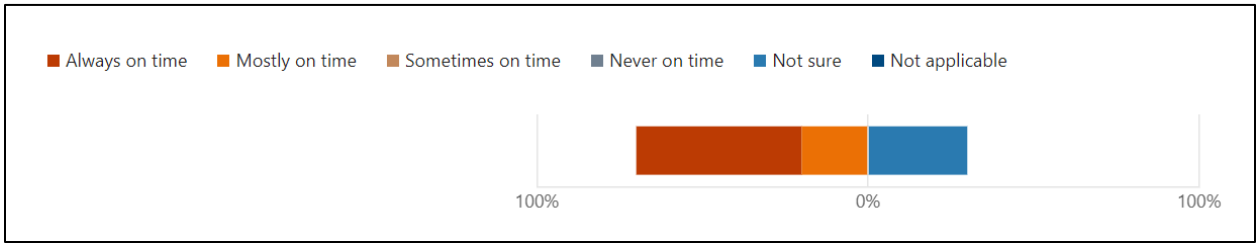
Outcome 4.B. – The majority of applicants and grantees agreed that Midpen provided sufficient guidance and timely responses to application questions, and grantees mostly agreed that reimbursement payments were received promptly. Rating: 3

Findings

- **Application support:** Applicant and grantee survey respondents (14) were asked how much they agreed with two statements about receiving application support and timely responses from Midpen. As shown in the graphic below, the large majority agreed or strongly agreed with both statements. One indicated that they did not agree that enough application guidance was provided.



- **Timeliness of reimbursements**: Grantees were asked about their experience with the timeliness of payments received from Midpen. As shown in the graphic below The majority indicated that payments were mostly or always on time; 3 grantees were unsure.



Analysis of Findings

- Based on the survey responses, most applicants indicated being most supported by the application stage processes, methods of communication, and/or scheduling.
- This also held true for the grantees' experiences with the timeliness of processing reimbursement requests.

Recommendations

- Continue to utilize GMP's previous applicant support and reimbursement work plans.

Outcome 4.C. – The effect of Midpen grants on grantees' capacity suggests mixed results. Rating: 2

Background: One of the purposes of the GMP as outlined in the discussion of Outcome 1 is to *build the capacity of academic and nonprofit institutions in order to sustain and grow the conservation field*. The Applicant and Grantee Survey included questions about the effort to apply for and manage a grant, the relative size of the grant awarded, and the percentage of indirect cost the grant covers. These effort-related questions, for the purposes of this report, serve as proxy indicators for whether a grant builds a grantee's capacity.

The underlying assumption is that the receipt of a Midpen grant outweighs the effort to pursue and manage a Midpen grant, thereby building grantee capacity. [7]

Findings

- Grantee survey responses to question related to the effort to apply for a Midpen grant:

Measure	Grantee Responses (N=11)
Effort to apply, as compared to other applications	A majority reported that the effort to apply was manageable. • Extra Effort: 1 • Manageable Effort: 6 • Some Effort: 3 • Not Sure: 1
Survey Respondent Comments on Effort to Apply for a Midpen Grant Award *"For the scope and amount of the grant, I thought that the application effort was just right. I also liked the criteria you use, and I appreciate that your application does not ask for the same info in different questions."* *"I appreciate having the pre-proposal stage to help reduce effort if the project is not a fit from the start. However, the proposal process was definitely more effort than a typical proposal that we see in this funding range ($25-50K), and more comparable to the proposal process that I see frequently for projects in the range of $100-250K."* *"We've been so grateful for the opportunities to apply for Midpen grants, but the eligibility requirements and applications seem to get harder to comply with. We recognize that those eligibility requirements are needed to focus on Midpen priorities, but this is not an easy grant to apply for."* *"An every-other-year RFP is too challenging."*	

- Grantee survey responses to questions related to the effort to manage (through reimbursements and reporting) a Midpen grant:

Measure	Grantee Responses
Reporting on Progress, as compared to other grant reporting process	The vast majority reported that the level of effort to report on progress was the same or less than other grant reporting processes. • Exceeds effort: 1 • Same effort: 7 • Less effort: 2 • Not sure: 1
Reimbursement Timeline	All respondents reported that the grantee-defined, flexible reimbursement timeline between 1 and 3 years was somewhat to very effective. • Very effective: 9 • Somewhat effective: 2
Survey Respondent Comments on Effort to Manage a Midpen Grant Award	

[7] "Capacity" is not defined but for the purposes of this review it is being interpreted broadly, i.e., it is inclusive of the grantee's ability to fulfill its mission effectively and sustainably.

> *"We like the length of reimbursement…it allows us to be flexible with our partners to either increase or decrease programming. In an effort to have a long-term impact on the community, we allocate Midpen grant funds throughout a two-year period and that fits with our budget. If we had more funds, we would then adjust to perhaps a three-year reimbursement period and provide more programming."*
>
> *"Reimbursements create more work for grantees and potentially cause issues with cash flow management."*

- Grant size:
  - Half of 10 grantee survey respondents indicated that their grant size was smaller than most grants they receive; five reported that the size was about the same as other grants; and one indicated that it was larger.[8]
- Indirect rate:
  - Midpen grants allow for a 10% indirect rate, as a percentage of the total program cost.

Analysis of Findings

- **Effort and Capacity**: While the data suggests a few exceptions, it can be interpreted that in general the added value of receiving a grant outweighs grantees' effort to apply for and manage a Midpen grant. From this perspective, as a result of receiving a Midpen grant the organization gains greater capacity to fulfill its mission.
- **Grant Size and Capacity**: Interpreting survey respondents' perspectives on grant sizes requires an understanding of the intended impact of Midpen as a grant maker, which is not currently clear. Questions of interest include:
  - Is it Midpen's strategy to focus on providing smaller, targeted grants? This could align with a strategy to support early-stage initiatives, grassroots organizations, or specific projects that require less funding. Or is the strategy reflecting a preference for spreading resources across a larger number of grantees to maximize reach and impact?
  - Does Midpen see itself as a supplemental supporter rather than a primary source of funding? For example, aiming to provide gap funding or match other sources of revenue. Or does Midpen's grant sizes simply reflect a competitive grantmaking process, where limited resources are divided among many applicants?
- **Indirect Rate and Capacity**: Indirect rates recognize that not all costs to run a program or project are directly related to the program or project. Paying an indirect rate is an organizational capacity building practice. Midpen has always allowed for a 10% indirect rate. The GMP reviewed the rates set by government agencies that often guide local reimbursement rates.
  - According to the National Council of Nonprofits, in October 2024 the federal Office of Management and Budget (OMB) raised its *de minimis* indirect rate from 10% to 15%.
  - The California Association of Nonprofits reports that the state congress is examining a bill that could raise the minimum indirect rate to 15%.

[8] The question was, "Thinking of your most recent grant and considering the length of your reimbursement period, how would you characterize the size of the award compared to your other grants?"

- An analysis of peer and near-peer organizations (Appendix 5) shows a large majority have adopted a rate above 10%.

These findings suggest that at 10%, Midpen's allowance would be considered low, and the funded organization may be challenged to cover the true costs of project implementation.

Recommendations

- Continue to explore ways to reduce grant application administrative burdens for the applicant to help increase the value of the grant.
- To help inform appropriate grant size, utilize the LFPAC study session to discuss grantmaking impact, and evaluate award amounts in light of the year over year increases in Midpen's property tax revenues and against peer grant makers.
- Consider increasing the indirect rate allowance to a minimum of 15%.

Areas of Success	Measures of Success
5. Equitability	A. Funding is multi-year and unrestricted
	B. Paperwork is simple/streamlined
	C. Burden of early-stage vetting is on the funder
	D. Engagement transparent
	E. Feedback is solicited
	F. Support beyond the check is provided

Overall Success Rating: 2

Background: The six Measures of Success associated with this Area of Success were developed by the Trust-based Philanthropy Project (TBP) to "advance a more just and equitable society by alleviating the inherent power imbalances between funders, nonprofits, and communities."

There was not an expectation that the GMP would employ the TBP model. Rather they are offered here as one framework to build awareness that grantmaking processes and principles do impact equitability, and this intersects Midpen's diversity, equity and inclusion (DEI) objective:

- Goal 3, Objective 2 (FY25) – Implement DEI strategies to build and strengthen partnerships, increase broad and inclusive public outreach and engagement, engage tribal groups in the District's work, and instill DEI values across all levels of the organization.[9]

Outcome 5.A. – The GMP does support multi-year grant periods and GMP grants are not unrestricted. While restricting the use of funds is a standard approach for a public funding agency, it is less equitable, according to TBP best practices. Rating 2

[9] Findings and analysis related to the GMP's contribution to Midpen's DEI objective are discussed with Area of Success #2: GMP Partnerships support Midpen goals and objectives.

Findings

- Multi-year funding (see sidebar)
    - A Midpen grant period can be for up to three years. The applicant proposes the length of the grant period.
    - Most grantees establish a multi-year grant period. According to grantee survey respondents, four had a 3-year grant period, four had a 2-year period and 2 had a one-year period.[10]
- Restrictions
    - Midpen grant awards are not unrestricted. The grant agreement describes that funds can "cover expenses related to the implementation of proposed projects within the approved project budget." These are identified as salaries/wages and benefits of those directly engaged in the execution of the grant project; travel; consultants/contractors; equipment and supplies; and indirect costs, capped at 10%.

From Stanford Social Innovation Review: "Distinct from continuous funding (a series of grants provided to the same recipient on an annual basis) multi-year funding is a firm commitment to at least two years of funding, ideally more."

Analysis of Findings

- Multi-year funding
    - Self-determined, multi-year grants support the specific needs of the grantee and is especially helpful for grantees' budget forecasting.
    - One grantee survey respondent commented: "We like the Midpen (multi-year funding) as it allows us to be flexible with our partners to either increase or decrease programming. In our case, in an effort to have a long-term impact on the community we allocate Midpen grant funds throughout a two-year period and that fits with our budget. If we had more funds, we would then adjust to perhaps a three-year reimbursement period and providing more programming."
- Restricted funding
    - It is highly unusual for a public funding agency to provide unrestricted grants. In stewardship to the public dollar that it manages, a public funding agency has an interest to ensure that funds are allocated to specific purposes aligned with their priorities and objectives. However, from the grantee's perspective, unrestricted funding is usually preferred as it supports their ability to direct revenue to where it's needed most.

Recommendations

- Continue employing the approach to multi-year and restricted funding.
- Consider limiting the reimbursement period to two years to align with the bi-annual release of RFPs, thereby supporting the grantee's opportunity to apply for a follow-on grant.

[10] It was not feasible, given the limitations of the current data management system, for this strategic review to analyze all grantees' reimbursement period.

Outcome 5.B. – While establishing a pre-proposal step meaningfully streamlined administrative efforts there are opportunities to consider more ways to decrease administrative burdens. Rating 1.5

Findings

- Policy
  - The GMP strives to reduce paperwork burdens on grantees. Board Policy 3.10 states that "the application and reporting structure (ensures) that smaller grantees are not prohibited from applying due to cumbersome application and reporting requirements in relation to the funding received." As noted in the grant agreement Midpen "designed the forms and procedures to keep organizational effort to the minimum for grantees."

- Proposals
  - The GMP provides two award levels: Up to $25,000 (Tier 1) and $25,001 to $50,000 (Tier 2). Table shows the proposal and reporting expectations for each Tier.

Proposal and Reporting Expectations by Tier

	Pre-Proposal	Full Proposal	Progress Updates	Annual Report
Tier 1	x	x	x	
Tier 2	x	x	x	x

- Proposals
  - Pre-Proposals were introduced in 2021 and are the first step in the application process for both Tier 1 and Tier 2 applicants. As stated in the RFP, the pre-proposals help the review committee to "(1) develop an understanding of interested organizations and potential grant applicants across the three funding priorities, and (2) ensure appropriate project endeavors and a balance across the three grantmaking priorities."
  - Tier 1 and Tier 2 applicants with high enough review scores are invited to submit a Full Proposal.
- Reports
  - Progress updates are expected of both Tier 1 and 2 grantees and generally happen when a grantee submits a reimbursement request.
  - An annual report (maximum of 5 pages) is only required of Tier 2 grantees and these have been required to be submitted by June 30.
- Reimbursements
  - When requesting reimbursement, a grantee completes the Payment Request Form, which includes a section on progress updates, the Budget Tracking Sheet, and all meeting agendas, associated invoices, receipts of expenditures, and/or timesheets.

Analysis of Findings

- The pre-proposal step is a streamlined application step and benefits all applicants as well the Midpen's internal stakeholders.
- The annual report, which provides a more detailed analysis of the funded work than the progress updates, is only an expectation of a grantee receiving more than $25,000; grantees receiving less than $25,000 do not have this requirement.
- Maintaining the proposal and report requirements for Tier 1 grantees is counterproductive to Midpen's interest to reduce barriers for grantees, and especially small organizations. While Tier 1 grantees have not been required to submit an annual report, they are required to fulfill both a pre and full proposal and reimbursement and progress update requirements.
- Reimbursement requests are paperwork heavy, time consuming and resource-intensive for both the grantee and Midpen.
    - Paperwork demands are more burdensome for small organizations.
    - Ensuring accurate and timely reimbursement, grantees managing reimbursable grants need financial systems capable of handling fund accounting, time tracking and staff allocations across different grants.
    - Failure to meet reimbursement rules and requirements can result in audits or loss of funding.
    - Grantees have commented that the reimbursement approach to distributing funding is not ideal.

Survey Respondent's Comments on Reimbursements

Please switch to making up front grant awards :)

Is there a world in which you don't make reimbursable grants, but traditional pay-up-front grants?

- Findings from research conducted on public agency grant reimbursement practices for this strategic review suggest that there is no universal legal requirement that public grants must be reimbursable.
- Although reimbursements can be a challenge because they can strain an organization's cash flow, it is helpful that 15% of a Midpen grant award can be requested up front, equating to $3,750 of a $25,000 grant and $7,500 of a $50,000 grant, with the stipulation that these funds be spent within six months. GMP staff are aware of only one request for up-front funding.
    - In 2023, a new California law (AB 590) designed to improve equitable access to state funding allows state agencies to advance up to 25% of the total grant amount to qualifying nonprofits, with provisions for larger advances in some cases.

Recommendations

- Continue the use of pre-proposals.
- Change the annual report submission date to 12 months from the date of the executed agreement.

- Consider exempting Tier 1 applicants from submitting a full proposal; identify modifications to the pre-proposal to support this innovation.
- Consider using an up-front full payment model for Tier 1 grantees or provide half of the grant up front and the other half upon completion, and/or increase advanced payment to 25% to be aligned with state and federal agencies.

Outcome 5.C. – Early-stage vetting, as an equity practice, has been very limited. Rating 1.5

Background: Similar to 'streamlined paperwork' approaches, early-stage vetting involves a funder's method of getting to know an applicant. As an equity measure, the TBP Project asserts that it is "the funder's responsibility to get to know the issues and organizations in their funding landscape, saving nonprofits time in the early stages of the vetting process." Early-stage vetting strategies include the following:

- Research available public records (e.g., information on their websites) to understand a prospective grantee's purpose, programs, leadership, and financial standing; explore others doing similar work; talk with other funders and collaborators who might have insights.
- Meet with highly qualified prospective grantees and, if possible, observe their programming.
- Look beyond usual circles to identify organizations that are aligned with the grantor's values and vision, but that may be overlooked due to implicit bias.
- Revisit grantmaking criteria to understand how it may be giving preference to more established or well-funded organizations, with the goal of having it center the needs, experiences, and priorities of the people closest to the issues.

Findings

- Previous RFP outreach plans have included applicant workshops and consultations to support their efforts.
- Interviews with previous GMP staff have noted that limited staff time has prevented GMP staff from deepening efforts with early-stage vetting processes.

Analysis of Findings

- GMP staff time has been too limited and/or the timeframe has been insufficient for early-stage vetting. Increasing the Senior Grants Technician from a .5 FTE to a 1 FTE is expected to provide additional capacity to execute early-stage vetting.

Recommendations

- Build in time during the pre-proposal review process to support GMP staff to conduct in-depth research on applicants.
- Conduct in-person outreach in locations where Midpen may be less familiar in the community.
- Review proposal templates to ensure that the information being requested is not otherwise publicly available.
- Leverage the Environmental Education Funders Collaborative membership to identify new applicants.

Outcome 5.D. – The level of transparent engagement is moderate. Rating 2

Background: According to Candid, a nonprofit leader supporting grantees and funders with access to comprehensive data and insights about the local communities, grant making transparency can help establish credibility and increase public trust, improve grantee relationships, lessen redundancy and increase collaboration, and build a community of shared learning.

Transparent measures include:

- Make publicly accessible all information to support applicant prospects' decision making and processes (see sidebar for details).
- Use e-newsletters, blogs, social media.
- Be clear up front about what is and is not fundable; let potential applicants know if meetings are not a good use of their time.
- Give grantees ample notice if making any changes that will affect their funding.
- Be open and honest about internal organizational struggles, questions, and thought processes.
- Invite grantees to share their own challenges.
- Conduct grantee surveys.

Accessible information includes:
- Contact information
- Mission and purpose
- Names/bios of key staff
- Board list, with affiliations
- Grantmaking strategies and policies
- DEI policies
- Grantmaking priorities, selection criteria and process, including guidelines
- List of past grants made, which should include recipient name, grant amount, and recipient location information.
- Assessment of overall grantmaking performance and effectiveness.
- Knowledge center
- Feedback mechanism

Findings

- **Accessible Information**
  - **Website:** Midpen maintains a website through which visitors can reach the mission and purpose of Midpen, access background and contact information about Board Members and the General Manager. There is a dedicated DEI page accessible from the Who We Are drop-down menu: Diversity, Equity & Inclusion at Midpen | Midpeninsula Regional Open Space District.
  - **Webpage:** The GMP maintains a webpage, Grantmaking Program | Midpeninsula Regional Open Space District, that includes information about the program's history, mission, purpose, funding priorities, and the amount that can be applied for. Also referenced is the most recent Request for Proposals, which details applicant guidelines, scoring criteria, the pre-proposal and full proposal templates, the grant agreement template, reimbursement processes and expectations, and program contact information. Additionally, the webpage includes the status of the most recent or current applicant period, notification sign-up form, contact information (noted also in Spanish), and the list of previous grantees by each grantmaking cycle. Each listing includes the grantee's name, a short description of the funded project, including the grant period length, the amount of the grant awarded and their awards, the amounts they received, and brief descriptions of their projects. The webpage also includes grantee stories.

  - **E-newsletters, blogs, social media/networking**: GMP highlights grantees' work in the internal Bi-Weekly newsletter.
- **Grantee survey**: For this strategic review, all grantees and applicants from the 2021 and 2023 rounds were invited to respond to a survey, with questions about clarity of guidelines and scoring, support provided, effort to apply and report, etc. While this is the first time a formal survey has been conducted, feedback has been solicited during application workshops and consultations.

Analysis of Findings

- The website and GMP webpage address the majority of the information that Candid posits as important for transparency.
- RFPs provide applicants with information about what is and is not fundable and how proposals are evaluated. The RFP process incorporates opportunities for prospective applicants to meet with GMP staff and ways to contact staff is provided enabling stakeholders to reach staff outside of planned meetings.
- What is not available, based on Candid's list of accessible information to include, is an assessment of overall grantmaking performance and effectiveness; a knowledge center; and a standardized feedback mechanism.
  - With only a 7-year history, the GMP is just now undertaking a review of its grantmaking performance and effectiveness. Being a young grant maker and also that the GMP is a small program, building a knowledge center, i.e., a repository of grantmaking lessons learned, program evaluations and reports, has not previously been considered.
- Two primary barriers to transparency were identified:
  1. Accessing the GMP URL, https://www.openspace.org/what-we-do/projects/grantmaking-program is unusually opaque. There is no direct link from the website homepage, and it does not appear on any drop-down menu. A visitor might attempt to look under the "Projects and Programs" menu option, but once there will find there are no pre-set search filters. The only way to find the webpage is through the search function.
  2. Inconsistent timing of the openings of each of the three grantmaking cycles (Cycle 1 opened February 2019, Cycle 2 opened August 2021, Cycle 3 opened June 2023) is a barrier because it reduces a nonprofit's ability to budget forecast.

Recommendations

- Work with Public Affairs to create greater visibility for/improve access to the GMP webpage.
- Consider distributing, and posting to the GMP webpage, this programmatic strategic review.
- Incorporate multiple, consistent, accessible, and easy to use stakeholder feedback mechanisms. See recommendations to 5.E. for details.
- Identify and implement ways to more frequently promote grantees through Midpen's external communication platforms.

Outcome 5.E. – Soliciting feedback happens, although inconsistently. Rating 2.5

Background: A grant maker's work will be inherently more successful if it is informed by the expertise and experience of grantee partners and communities. Insights gained can help a funder better serve grantees; encourage mutual trust and authenticity; and improve a funder's practices and policies. Informing stakeholders about actions taken as a result of the feedback is also important.

Findings

- There are multiple ways the GMP has solicited feedback, including informal notes, formal surveys, site visits, and professional learning experiences.
    - **Informal notes**: Feedback from applicants was welcomed during applicant webinar workshop, individual consultations, and via email upon confirmation of receipt for pre-proposal and proposals. Suggestions from GMP staff and from feedback from 2021 and 2023 proposal reviewers collected through GMP staff's pre and post proposal evaluation discussions has been captured in an "improvement notes" file on SharePoint. Input from proposal reviewers may also be found in their scoring evaluation notes (for example, one reviewer commented that the Engagement criteria was hard to apply to Applied Science applicants).
    - **Surveys**: This strategic review is the first formal survey conducted with applicants, grantees and proposal reviewers.
    - **Site visits**: A limited number of site visits have been conducted. The objective of site visits is generally to deepen the funder's understanding of the grantee's work and impact, and address questions and concerns from either party, and generally build relationships.
    - **Professional Learning:** Midpen has been a member of the Environmental Education Funders Collaborative (EEFC), an initiative designed to advance learning and conduct joint action to increase access to environmental education and outdoor experiences for all young people in the Bay Area. As a professional network that meets bi-monthly, engagement with EEFC supports the GMP through sharing environmental education funding experiences and the potential for incorporating learnings into grantmaking processes and goals. EEFC uses an annual 'learning agenda' to focus its conversations. The themes of the most recent years have focused on equity. There has been no reporting out by GMP of EEFC learnings (see 2024 Highlights as an example) and no known action taken as a result of the learnings.

Analysis of Findings

- While soliciting feedback happens, with limited GMP staff time it has not been implemented consistently. Soliciting feedback through more time-intensive methods, such as site visits and formal surveys, is challenging. In general, the GMP would benefit from a standardized practice of soliciting feedback.

Recommendations

- Establish formal feedback opportunities within existing processes. For example, a link to a short questionnaire in an auto-response confirmation email, or a short survey to all proposal reviewers.
- Be transparent with action taken as a result of feedback and other learning. Look for opportunities to share learning with others.
- Continue participation with EEFC and explore ways to strategically leverage the resources available through the network.

Outcome 5.F. – It has been the intention of the GMP to offer and provide resources beyond grant funds. Staffing limitations have prevented the successful implementation of this. Rating 1.5

Background: Funders have more to offer than dollars alone. Responsive, adaptive, non-monetary support bolsters leadership, capacity, and organizational health. Examples of such support can include invitations to trainings and workshops, providing subject matter expertise, sponsoring a service/subscription and meeting space, and/or connecting grantees with other funders.

Findings

- Providing 'support beyond the check' has been an objective of the GMP as a way to encourage organizations with limited or minimal organizational capacity to apply, as demonstrated by the question on the proposal form, which asks, "Does your organization require support from Midpen to achieve the project as described in this proposal? If so, describe or discuss your support in addition to grant funding (e.g., subject matter expert input, technical data, reporting assistance) needed from Midpen."
    - Many grantee survey respondents (5 of 11) noted that they did not receive support from Midpen in ways that go beyond financial support. Three responded, "yes" and three were "not sure".
- Anecdotally, at the time of this analysis, GMP staff is aware only of Applied Science applicants' request for help from Natural Resources staff; it is understood that one request was fulfilled.

Analysis of Findings

- Offering support beyond grant funding helps expand Midpen's relationship from grantor to partner. It suggests an investment in the success of the organization and not just the grant-funded project.
- While it appears that requests for support have been limited to Applied Science applicants, it is not clear what help was provided and how this might differ from other engagement with Natural Resource staff. For example, it is noted that on the pre-proposal form that Applied Science applicants are required to consult with Midpen staff prior to full proposal submittal for the narrowly stated purpose of determining whether faculty sponsorship is required. As well, debrief notes from previous GMP staff indicate that more communication with Natural Resources staff about permitting needs is needed.

Recommendations

- Assess the inclusion of offering Midpen resources and how to engage those resources. Considerations: Develop a process that includes the would-be impacted staff to discuss the commitment; ensure that any offer of support is clear, equitable, and optional; expand beyond "subject matter expert input, technical data, and reporting assistance" to include non-technical support such as invitations to Midpen-hosted trainings and/or workshops, use of space, etc.; if a proposal is funded, ensure that staff will deliver to the grantee on all requests for support.

Areas of Success	Measures
6. Awareness among Stakeholders	A. # of Presentations to board/staff by GMP staff and/or grantees
	B. Grant outcomes[11] and/or grantee stories distributed electronically (on website and through newsletters

Overall Success Rating: 1.5

Outcome 6.A. – No outcome presentations to board/staff by GMP staff and grantees have been made. Rating: 1

Findings

- One of Midpen's grant agreement project deliverables is for grantees to give a presentation to Midpen's Board of Directors. To date, no presentations to either board or staff about grant-funded activities have been made. It is not clear how many grantees report outcomes.
- Previous GMP staffing limits suggest that it was challenging to prioritize scheduling and working with grantees to make presentations and tracking outcomes.

Analysis of Findings

- GMP staff have always made board presentations about the results of the latest grantmaking round, including an overview of the grantmaking program, updates on the current year's RFP process, and details about the organizations and projects of the grantees being selected for awarded. The presentations have not included reports on grant activity outcomes, which can be understood in that there has not been an expectation of applicants and grantees to identify and report outcomes, which restricts Midpen's understanding of the impact of its grant making.
- With the increase from .5 to a 1 FTE for the Senior Grants Technician position it is expected that some time can be used to coordinate grantee presentations.

Recommendations

- Remove the reference to making presentations as a "project deliverable" requirement in the grant agreement and consider including a statement of invitation. In practice, many grantees welcome the opportunity to present their work to a funder.

[11] Outcomes refers to the near-term qualitative changes that resulted from a grantee's grant-funded activities.

- Utilize the increased GMP capacity to schedule and support grantees to make presentations to board and staff; consider a more casual "lunch and learn" presentation format instead of, or in addition to, board presentations.
- Enable a process to collect outcome information from grantees and analyze that information for reporting to the board.

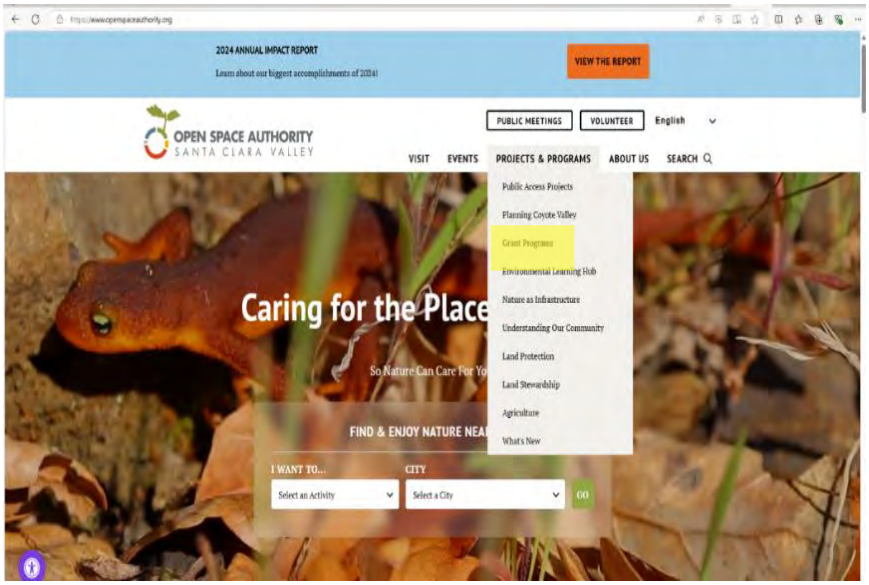
Outcome 6.B. – Grant outcomes and/or grantee stories are distributed electronically (on website and through newsletters) but the content is not easily accessible on the website and is not robust in newsletters. Rating: 2

Findings

- As noted in the discussion about transparency (see Success Area 5) GMP makes available comprehensive information on the program's webpage, Grantmaking Program | Midpeninsula Regional Open Space District. However, grantee stories have not been updated regularly.
- There are two e-newsletters where GMP has published information about the program and grantees and includes a link to GMP's webpage. Newsletter content about grantees is developed from a grantee's progress reports, which are submitted when the grantee requests reimbursements, and/or a grantee annual report, the latter applicable only to grantees with a total award amount above $25,000. Grantees are featured in Midpen's internal *Bi*-Weekly newsletter, and the external quarterly newsletter, *Views.* Since the Winter 2020 edition, grantees have been highlighted in *Views* at least three times.

Analysis of Findings

- While the GMP webpage offers valuable information, the location of the GMP's webpage is obscure. By contrast, our peer grantmaking organization, Santa Clara Valley Open Space Authority, features their grantmaking program prominently on their homepages, making the work of the grantees more accessible to the public (see screenshot below).



- Receiving content from grantees is sporadic, and by design, the progress reports are meant to be brief. Grantees' annual reports are detailed but are also received infrequently. As a result, grantees do not have a consistent presence in our newsletters and when they are featured may not showcase the richness of their grant-funded activities.

Recommendations

- Work with Public Affairs to create greater visibility for/improve access to the GMP webpage.
- Develop with the Senior Grants Technician a workflow to regularly refresh the webpage.
- Consider proactively engaging with grantees to develop articles about their grant-funded activities.
- Request annual reports for 12 months from executed agreements, not annually in June.

Areas of Success	Measures
7. Management System	A. GMP data and document management systems and personnel capacity adequately support the program's needs
	B. Midpen's GMP is comparable with peer organizations

Overall Success Rating: 2

Outcome 7.A. – There are efficiency challenges with the current GMP data management system. The timeframe for proposal review has been hard for reviewers to balance with other responsibilities. Offers of extra support, through subject matter expertise and/or one on one application guidance, have been hard to follow through on. Rating: 2

Findings

Data Management Systems

- GMP has experimented with two grant award management systems, Fluxx and Amplifund, and both were not adopted for long-term use. Previous GMP staff described them as "promising a lot but not delivering" and being expensive.
- GMP currently uses Excel (for proposal scoring) and SharePoint (for file storage) as the program's data and document management tool.

Personnel Capacity[12]

- GMP Staffing Structure
    - The Grants Program staffing has grown consistently with the growth of the program. Beginning in FY25, the team grew to 3 FTE, up from 2.5 FTE, and includes three full time positions: Grants Program Manager, Grant Management Analyst, and Senior Grants Technician. The Manager and the Technician are responsible for the GMP

[12] It is beyond the scope of this review to conduct a staffing audit. For the current purposes, the data collected reflects anecdotal experiences that could inform, if warranted, future analysis.

  - It is estimated that .4 FTE between the Grants Program Manager and the Senior Grants Technician is adequate to conduct GMP activities as the program is currently structured. This time allocation, however, is not distributed across a fiscal year. Rather staff time has spiked to >1 FTE when issuing and managing an RFP cycle.
  - Insights from interviews with Midpen's CFO and GM (leadership) reflect an interest to further capitalize on the program to enhance the visibility of Midpen by strengthening connections with community groups and expanding the GMP's role as a platform for engagement. Leadership also commented that the GMP has required more time and effort than originally anticipated.
  - Previous GMP staff noted that engagement with grantees, through presentations and site visits, had been very limited, primarily because of time constraints and, with regard to site visits, the pandemic.
- Extra support for applicants:
  - Subject Matter Experts: Applicants have had the option to include a "capacity building" request as part of their application. Examples provided in the RFP include Midpen subject matter expert input, technical data, and reporting assistance. While the number and type of capacity requests were not evaluated for this strategic review, previous GMP staff noted that, in general, subject matter experts could not fit capacity requests received into their workload and that there was insufficient time for staff to review the capacity requests.
  - 1:1 support to applicants: The Board and leadership have expressed interest to ensure that smaller-sized organizations are encouraged and supported to apply. In 2023, the Board inquired as to why there were no grant award recommendations for Tier 1 applicants (requests for $25,000 or less), wondering if the effort exceeded the value.[13]
    - Discussion notes indicated that staff capacity was the primary barrier to providing more outreach to and support of small-resourced agencies.
- Proposal review effort:
  - Review Timeline: While the use of pre-proposals benefited GMP staff and proposal reviewers,[14] previous GMP staff noted that the timeframe for both pre and full proposal reviewing was too fast and put too much of a burden on staff reviewers. This awareness is reflected by 5 of the 9 proposal reviewer survey respondents who indicated that they did not have enough time to go through each pre-proposal. Five of the 9 reviewer survey respondents also said they did not have enough time to adequately review the full proposals.
  - Reviewer Competency: Most (6 of 9) proposal reviewer survey respondents indicated that they felt they had the competency to evaluate all proposals. Among the other three, one said no, and two were unsure, if they had the competency. Comments from

[13] In the 2023 grantmaking cycle, 25% of applicants (10) were in Tier 1; 3 were invited to submit a full proposal.
[14] As a best practice and reflecting the intentions of trust-based philanthropy, the use of pre-proposals helps to reduce the barrier to applying for grants and enables the grant funder to grow its awareness of organizations and programs addressing matters of interests.

two respondents noted that natural resource-related subjects were challenging, one stating that they "felt out of my league."

Analysis of Findings

Data Management

- Current GMP staff are new to the program and have not yet implemented a grantmaking cycle to fully experience the effectiveness of the current data and document management structure to manage a proposal submission process. When there were fewer proposals to manage (21 in 2019; 28 in 2021) a more sophisticated system, like Fluxx and Amplifund, likely did not make sense. The management of the increased number of proposals in 2023 (from 28 to 40), however, may have benefited from a more robust system.
- As well-organized as the storage/filing system appears to be, it is inefficient for data analysis. Preparing for this strategic review GMP staff experienced the time-intense effort to manually collect and develop methods to analyze applicant and grantee data.

Personnel Capacity

- The increased FTE of the Grants Technician position, from a .5 FTE to a 1 FTE, is anticipated to support leadership's interest to "capitalize on the GMP by strengthening connections and expanding its role as a platform for community engagement" and "foster mutual learning" through grantee presentations to the Midpen audience. The increased capacity is also expected to allow GMP staff more flexibility to provide support to applicants through the application process, as well as conduct more research about grantees as part of the pre-proposal review stage (refer to discussion in 5.C. about the benefits of early vetting by funders) and work with grantees to make presentations.
- An average .4 FTE GMP staffing level may be adequate, but it should be understood that the time is unequally distributed across a fiscal year will still impact GMP staff availability for other Grants Program tasks. To help mitigate the 'RFP spike' the GMP envisions an extended timeline (~9 months) to complete the full cycle (i.e., through executed agreements).
- There is broad agreement that the timeline for proposal review and the ability to address applicant requests for subject matter support needs improvement.
- This strategic review did not include a process to evaluate proposal reviewers' scoring and associated comments, which limits the understanding of why Tier 1 applicants were not recommended for grant awards. A brief assessment identified that some proposal reviewers expressed a lack of clarity about what was proposed and/or that there was insufficient information provided to adequately score the proposal against the criteria. Comments made by proposal reviewer survey respondents indicated that the criteria did not always seem applicable for each funding area. Also, it should be noted again that Tier 1 applicants, just like Tier 2, must submit both a pre- and full-proposal.[15]

[15] For reference, the main difference in terms of effort between a Tier 1 and Tier 2 grantees is that Tier 1 grantees are not required to submit an annual progress report, which asks for detailed information.

Recommendations

- GMP staffing structure: Maintain the newly established 1 FTE for the Senior Grants Technician position; evaluate impacts of efforts to expand the responsibilities.
- Data management
    - Before the next RFP release,
        - Evaluate the demands on data and document management and assess the 'tipping point' for when a robust system should be implemented.
        - Initiate a review of grant award management systems.
- Proposal review process
    - Evaluate the application review process to
        - Explore the role of the GMP team as lead reviewers;
        - Assess the appropriate number of staff reviewers; and
        - Consider creating 'proposal portfolios' by funding priorities and assigning reviewers to the portfolio(s) that align with their area(s) of expertise.
    - Build more time for the entire RFP planning, release and grant agreement execution processes.
    - Explore if/how proposal reviewers should account for their time as part of the annual resource loading exercise.
    - Limit Tier 1 applicants' effort to only pre-proposals, as a strategy to reduce demands on GMP and Midpen reviewer staff time, in addition to serving as an equitable practice to reduce administrative burdens on applicants.
- Capacity building requests
    - Deepen GMP staff's understanding of the nature of the requests and the process of evaluating subject matter experts' availability to support such requests.

Outcome 7.B. – Midpen's grantmaking program is comparable/shares many similarities with its closest peer organization, Santa Clara Valley Open Space Authority (OSA), although a key exception is the funding levels. Midpen's allowable indirect rate is considered low within the grantmaking industry, but is higher than OSA's. Rating: 2

Background: Comparative analysis of peer organizations is a valuable tool for benchmarking and evaluating an organization's performance relative to similar entities. It allows organizations to gain a deeper understanding of their standing within their industry and identify opportunities for growth and enhancement.

GMP staff identified Santa Clara County Open Space Authority, Grant Programs | Open Space Authority, as a peer organization: OSA is a public land management agency that makes grants in the San Francisco Bay region. The comparison draws from OSA's 2022-2023 grantmaking cycle. OSA's grantmaking program informed Midpen's 2021 grantmaking cycle.

Findings

Comparative Measure	OSA	Midpen
Source of revenue	Voter-approved Measures Q and T property tax assessment that provides for up to 25% of tax revenues for the grantmaking program	Voter-approved Measure R property tax assessment
Amount available	$750,000 (for programs)	$250,000
Grant award sizes	$20,000 - $100,000	Tier 1: ≤$25,000 Tier 2: $25,001 - $50,000
# of Grants awarded, estimated	11 – 15	5 – 7
Advance payment amount	None.	15%, to spend within 6 months
Frequency of grant cycle	Bi-annual	Bi-annual
Grant performance period	2 years	1 – 3 years
Funding structure	Reimbursement basis	Reimbursement basis
Indirect rate allowed	5%	10%
Eligible applicants	• Public Agencies • Schools and School Districts • Nonprofits	• Public Agencies • Schools/ Academic institutions • Nonprofits • Fiscally sponsored programs
Match requirement	25% for organizations with a revenue budget over $10 million	None
Pre-application step	Yes	Yes
Funding areas	• Environmental Stewardship & Restoration • Parks, Trails, and Public Access • Environmental Education • Urban Agriculture / Food Systems	• Applied Science • Access, Interpretation and Education • Network and Partnership Support
FTEs – estimated; excludes non grantmaking staff	.7 FTE	.4 FTE

Analysis of Findings

- Midpen's grantmaking program shares many similarities with OSA. A key exception is the grant award budget, funding levels and, correspondingly, the number of grant awards made.
    - OSA's grants range from $20,000 to $100,000 across 2 years and Midpen's awards are capped at $50,000, which could be distributed across 3 years.

- It is unclear how Midpen determined to set $250,000 award budget. OSA set its benchmark in the text of Measures Q and T. OSA's grantmaking for programs was restricted to $200,000 until 2023 when the agency raised its budget dramatically for programmatic grants to $750,000.
- Two other differences of note are the advanced payments and match requirement.
    - OSA does not make advance payments.
    - Until 2023, OSA required matching funds for all grantees. OSA notes that removing the match for smaller organizations was an equity strategy.

Recommendations

- Continue allowance for advance payments and no match requirement.
- Consider increasing the indirect rate allowance to a minimum of 15% (see Outcome 4.C. for discussion about indirect rate and organizational capacity), which aligns with most peer and near-peer organizations (see comparisons in Appendix 5).
- Discuss the size of Midpen awards and the award budget
    - To help inform appropriate grant size,
        - Utilize the LFPAC study session to discuss grantmaking impact.
        - Evaluate award amounts in light of the year over year increases in Midpen's property tax revenues and against peer grant makers.

4. Innovation

Support for Ag-based Environmental Education

Background: Conducting a strategic review of the GMP presented an opportunity to consider programmatic innovations. Ag-based environmental education was identified as an area that, in light of Midpen's presence on the San Mateo County coast where farming and ranching are active, was under-recognized in Midpen's grantmaking.

Two policy-based statements framed the exercise of studying ag-based learning as an environmental education strategy: Midpen's coast-side mission statement, and the Access, Interpretation and Education (AIE) funding priority description.

- Coast-side mission statement: *To acquire and preserve in perpetuity open space and agricultural land of regional significance, protect and restore the natural environment, preserve rural character, encourage viable agricultural use of land resources, and provide opportunities for ecologically sensitive public enjoyment and education.*
- AIE funding priority description: *…(T)o foster an appreciation for open space protection, nature study, and environmental stewardship…(through) projects that contribute an understanding and appreciation of our natural systems, restore indigenous knowledge, facilitate opportunities for outdoor engagement and nature-based experiences, or provide nature-based educational and interpretive experiences for children and/or adults.*

While the AIE statement broadly aligns with the coast-side mission statement, it does not specifically identify agricultural-based learning as an approach.

To understand if and how ag-based learning contributes to the AIE purpose of fostering an appreciation for open space protection, nature study, and environmental stewardship, GMP staff met with program staff of two nonprofits based on the San Mateo coast recommended by Midpen Ward 7 Director Zoe Kersteen-Tucker: the HEAL Project and UC Elkus Ranch. Both organizations offer, respectively, crop and animal-focused programming to children and youth and describe their work as promoting environmental stewardship.

- *The HEAL Project seeks to* foster *students' connection between food, health and the environment grows the next generation of environmentalists, scientists, sustainable farmers and change-makers.*
- *UC Elkus Ranch, aims to provide hands-on environmental education opportunities to learn about the production of food and fiber, the inter-relationships of plants and animals in their natural habitats, and the importance of environmental stewardship.*

Findings

The key takeaway from the conversations with the nonprofits' program staff was that an environmental stewardship mindset is developed when, through experiential learning opportunities, young people become comfortable in nature, recognize where their food comes, and experience the inter-relationship of plants and animals in their natural habitats.

The HEAL Project's Theory of Change graphically illustrates this:



GMP staff conducted online research to further understand how the ag-based learning and environmental education overlap.

- **Hands-On Learning and Place-Based Education**: Farm-based education often uses "place-based" learning, where students engage directly with their surroundings, such as farms and natural ecosystems, to construct knowledge. Activities like planting, harvesting, or composting allow learners to explore the interconnectedness of agriculture and the environment. This is similar to the HEAL Project's curriculum, which emphasizes sustainable agriculture and environmental stewardship while fostering curiosity about food systems and nature.
- **Building Agricultural and Environmental Literacy**: Both fields aim to enhance literacy in their respective areas—agricultural literacy focuses on understanding food and fiber systems, while environmental literacy emphasizes ecological awareness and problem-solving skills. When combined, these literacies empower individuals to critically analyze agricultural practices' environmental impacts and advocate for sustainable solutions. For example, UC Elkus Ranch provides hands-on opportunities to learn about the production of food and fiber ("While brushing a goat, meeting a chicken, or exploring our bone and fossil collections in our historic barn, students learn about adaptations, predator/prey relationships and food chains") helping to bridge the gap between food production and environmental sustainability.

In summary, farm-based education combines agricultural literacy with environmental stewardship, fostering a deeper understanding of sustainable practices and ecological systems. This synergy creates

opportunities for learners to engage with the natural world, understand food systems, and develop environmental responsibility skills.

Analysis of Findings

- This strategic review confirms that a shared understanding of the alignment of ag-based environmental education with the AIE funding priority fosters an appreciation for open space protection, nature study, and environmental stewardship.

Recommendations

- The GMP would like to encourage more ag-based environmental education programs to apply for funding and suggests that, in the near term, the AIE funding priority description explicitly identify this as an AIE approach and include an example of the kind of project in this field that Midpen would be interested in funding.
- The study did not include a landscape analysis of nonprofit organizations working in this field within Midpen's jurisdiction. If such analysis were done, it would indicate the scale of potential demand for ag-based environmental education funding. Such information could be used to consider if a new ag-based environmental education funding priority area is warranted.

5. Appendices

Appendix 1 - District Grantmaking Program Policy, effective 2/28/2018

District Grantmaking Program	**Policy 3.10** **Chapter 3 – Fiscal Management**
Effective Date: 02/28/2018	Revised Date: N/A
Prior Versions: 11/17/2010; 11/14/2007	

Purpose

The purposes of the District's Grantmaking Program are to a) support projects that further the District's mission, b) build the capacity of academic and nonprofit institutions in order to sustain and grow the conservation field; and c) facilitate the District's mission and work by building and strengthening partnerships.

Grantmaking programmatic focus areas

Programmatic priorities

The District's Grantmaking Program will include a broad focus to ensure a range of projects are considered and reflect the diversity of work in which the District engages. Grantmaking will be guided by an emphasis on investments that reflect a regional focus and provide avenues for partnership, both with the District as well as among other stakeholders.

Using these guiding principles, eligible project categories will include proposals focusing on applied science; networks, partnerships; and access, education and interpretation. General grant parameters for each grant proposal category are outlined below, with the grant solicitation providing additional detail for each category.

Applied Science

Research proposals will include academic or practitioner science projects that support the protection and enhancement of natural resources on District lands. The purpose of this support is to develop and disseminate information that advances scientific understanding of natural processes. Projects with potential to increase the effectiveness of applied stewardship of resources on District lands will be preferentially considered. Types of projects may include applied academic research or proof-of-concept, with focus areas including topics such as integrated pest management, species habitat, restoration, or similar topics relating to natural resource management. Faculty at accredited academic institutions must sponsor research-related projects and field research must take place on District lands. Practitioner science projects other than peer-reviewed research may require faculty sponsorship, and will be determined on a case-by-case basis.

Network and Partnership Support

In order to broaden its impact and ensure District priorities are aligned with multi-jurisdictional conservation and recreation plans, grant proposals that cultivate, sustain, or grow established conservation networks will be accepted. Network or partnership support could take the form of

facilitation or other consulting support, staff time for network participation, outreach, meeting supplies, etc.

Access, Interpretation and Education

Funding for access, environmental interpretation and education will be directed towards ensuring equal opportunity for all residents to take advantage of District lands while fostering an appreciation for open space protection, outdoor recreation, and environmental stewardship. The focus will be on funding projects that encourage access to and use of District preserves by all and in creating and executing nature-based educational and interpretive experiences for children and adults. Funding can be used for staff time to create or execute programming, transportation, educational and interpretive programming materials or supplies, facilitate knowledge of outdoor recreational opportunities, access to the outdoors, and environmental stewardship activities.

Grant management and internal controls

Program administration

The Grants Specialist will oversee the grant solicitation, selection, and grant management once selected. Other departments, including Visitor Services and Natural Resources, will be brought in for technical expertise to assist in evaluating proposals through a review committee. Once the grants have been selected, the Grants Specialist will oversee the administrative requirements for grant management, with at least one technical content expert from the relevant department assigned to assist in evaluating grant progress.

Proposal solicitation, selection and due diligence

The District is committed to soliciting proposals from a diverse range of organizations and application solicitations will be broadly disseminated to encourage organizations that reach underserved communities to apply. Additionally, the District will consider past District funding in its scoring criteria in order to increase the competitiveness of organizations that have not previously received District funding.

Eligible grantees will include accredited academic institutions, 501(c)(3) nonprofits, or public entities. Organizations without an IRS-designated status will be eligible for funding if a fiscal sponsorship is established prior to application submittal. A formal evaluation criteria will be used to select proposals for funding, including the organization's ability to administer the grant. Example evaluation categories include the applicant's ability to successfully complete the proposed work in the anticipated timeline and budget, past District funding, fit with District's mission, Board priority, and potential to develop new partnerships.

Grant terms and internal controls

The maximum award for individual grants will be $50,000. The award can be expended as necessary within a three-year grant term, contingent on satisfactory progress on grant objectives. Grants will be administered on a reimbursement basis, with up to 15% available up front if the grantee has a demonstrable need. Grantees will be eligible for reimbursement costs up until the original grant amount, contingent on satisfactory progress toward grant goals.

Grant applications and reporting

Grantees will be responsible for submitting annual or semi-annual reports that summarize activities and any relevant findings, alongside periodic check-ins with District staff. Additionally, grantees may also be asked to present the grant outcomes to the District staff and/or the Board in addition to formal reporting. Additionally, reimbursement submissions will require expenses to date recorded against the budget, along with invoices and accomplishments and milestones achieved during the reimbursement period.

The application and reporting process will be specific to a) the grant category, and b) the dollar amount awarded. Applications and reporting procedures will have two tiers of requirements (up to $25,000 and up to $50,000). This structure will ensure that smaller grantees are not prohibited from applying due to cumbersome application and reporting requirements in relation to the funding received. Additionally, the District will require that grantees make any acquired data, educational/interpretive materials, or conclusions available to the public. The Board will receive updates on the status of the grants and outcomes through an annual report.

Additional grant requirements and process

- Application solicitations will be released every year or every other year when funding is available and the District Grantmaking Policy will be evaluated every three years and updated as necessary. Grantees will continue to be eligible for additional application cycles, with no funding tenure limit.
- Eligible projects must not result in permanent damage and/or impairment to habitats or natural resources on District lands and will be in compliance with the District's Permit to Enter procedures (required for research projects).
- If indirect costs are costs incurred that do not have directly attributable expenses, they may be charged at no more than 10% of total grant cost. Examples include general and administrative costs, general equipment purchase or maintenance, and salaries and benefits of executive or administrative personnel who may not be directly engaged in the project. Subcontractors are excluded from indirect cost calculations.

Appendix 2 - Seven Areas of Success and their Outcomes and Recommendations

Area of Success 1: Purpose.

Outcome 1 – A statement exists that defines the purpose of the GMP and details the priorities for its work. There are potential redundancies between the GMP and the Public Affairs Partnership Program that may create confusion. RATING: 2.75

Recommendations:

- Utilize the LFPAC study session to discuss
    - A GMP impact statement; and
    - Approaches that enhance the "comparative advantage" of the GMP, such as higher grant award levels and funded activity outcomes.

Area of Success 2: Organizational goals/objectives.

Outcome 2.A. – The GMP's three funding priority areas address nine objectives across three goals. Grantees are solidly aligned with Midpen's goals and objectives. Grantees' funded activities most frequently support the objectives of Goal 3, "Connect people to open space and agricultural lands, and a regional environmental protection vision." RATING: 3

Recommendations:

- When recommending grant awards to the board, include a brief analysis about how grantees align with and support Midpen's strategic goals and objectives.

Outcome 2.B. – DEI objectives have been explicitly identified/referenced for the GMP and within the most recent RFP. Consideration of DEI in outreach and evaluation of proposals are present but limited. RATING: 2.5

Recommendations:

- Continue to include the revised language and example projects to highlight the types of projects Midpen is interested in supporting.
- Make available on-demand written material in Spanish and other languages as applicable.
- Make readily visible the availability of interpretation services; ensure easy accessibility.
- Conduct outreach to networked organizations, such as the members of the Environmental Education Funders Collaborative, that reach organizations with which Midpen does not have direct connections.
- Provide clear guidance to proposal reviewers for assessing DEI-elements of a proposal; consider a specific DEI-related scoring criterion.

Area of Success 3: Diversity.

Outcome 3.A. – Midpen applicants and grantees have been largely distributed across the three funding priority areas, but only the Access, Interpretation and Education funding priority areas has had a grantee every cycle. RATING: 2.75

Recommendations:

- Utilize the LFPAC study session to review descriptions of all three funding priorities.
- To improve outreach to AS application prospects, engage university Foundation Relations offices and survey them about grant size implications.

Outcome 3.B. – The geographic locations of Midpen applicants and grantees have been largely diverse. RATING: 3

Recommendations:

- Continue to diversify the pool of applicants, review and refresh the outreach plan, identifying new communication platforms, especially in person and on the coast.
- Incorporate into the pre-proposal form an explicit request to identify the location(s) of the proposed activities.
- Clarify and/or confirm the RFP requirement that grant-funded *field* services be conducted on Mipen Preserves and communicate to proposal reviewers.

Area of Success 4: Effectiveness.

Outcome 4.A. – Midpen grantees have accomplished their Approved Work Plan within the project budget, but the information is incomplete. RATING: 2.5

Recommendations:

- Utilize the LFPAC study session to discuss grantmaking impact.

Outcome 4.B. – The majority of applicants and grantees agreed that Midpen provided sufficient guidance and timely responses to application questions, and grantees mostly agreed that reimbursement payments were received promptly. RATING: 3

Recommendations:

- Continue to utilize GMP's previous applicant support and reimbursement work plans,

Outcome 4.C. – The effect of Midpen grants on grantees' capacity suggests mixed results. RATING: 2

Recommendations:

- Continue to explore ways to reduce grant application administrative burdens for the applicant to help increase the value of the grant.

- To help inform appropriate grant size, utilize the LFPAC study session to discuss grantmaking impact, and evaluate award amounts in light of the year over year increases in Midpen's property tax revenues and against peer grant makers.
- Utilize the LFPAC study session to discuss increasing the indirect rate allowance to 15%.

Area of Success 5: Equitability.

Outcome 5.A. – The GMP supports a multi-year grant period. GMP grants are not unrestricted; while restricting the use of funds is a standard approach for a public funding agency, it is a less equitable practice. RATING: 2

Recommendations:

- Continue employing the approach to multi-year and restricted funding.
- Consider limiting the reimbursement period to two years to align with the bi-annual release of RFPs, thereby supporting the grantee's opportunity to apply for a follow-on grant.

Outcome 5.B. – Paperwork has been modestly streamlined, enabling grantees to more efficiently apply for and manage a Midpen grant. There are opportunities to consider more ways to decrease administrative burdens. RATING: 2.5

Recommendations:

- Continue the use of pre-proposals.
- Change the annual report submission date to 12 months from the date of the executed agreement.
- Consider exempting Tier 1 applicants from submitting a full proposal; identify modifications to the pre-proposal to support this innovation.
- Utilize the LFPAC study session to consider using an up-front full payment model for Tier 1 grantees or provide half of the grant up front and the other half upon completion, and/or increase advanced payment to 25% to be aligned with state and federal agencies.

Outcome 5.C. – Early-stage vetting, as an equity practice, has been very limited. RATING: 1.5

Recommendations:

- Build in time during the pre-proposal review process to support GMP staff to conduct in-depth research on applicants.
- Conduct in-person outreach in locations where Midpen may be less familiar in the community.
- Review proposal templates to ensure that the information being requested is not otherwise publicly available.
- Leverage the Environmental Education Funders Collaborative membership to identify new applicants.

Outcome 5.D. – The level of transparent engagement is moderate. RATING: 2

Recommendations:

- Work with Public Affairs to create greater visibility for/improve access to the GMP webpage.
- Consider distributing, and posting to the GMP webpage, this programmatic strategic review.
- Incorporate multiple, consistent, accessible, and easy to use stakeholder feedback mechanisms. See recommendations to 5.E. for details.
- Identify and implement ways to more frequently promote grantees through Midpen's external communication platforms.

Outcome 5.E. – Soliciting feedback has not been a formal process. RATING: 2.5

Recommendations:

- Establish formal feedback opportunities within existing processes. For example, a link to a short questionnaire in an auto-response confirmation email, or a short survey to all proposal reviewers.
- Be transparent with action taken as a result of feedback and other learning. Look for opportunities to share learning with others.
- Continue participation with EEFC and explore ways to strategically leverage the resources available through the network.

Outcome 5.F. – It has been the intention of the GMP to offer and provide resources beyond grant funds. Staffing limitation have prevented the successful implementation of this. RATING: 1.5

Recommendations:

- Assess the inclusion of offering Midpen resources and how to engage those resources. Considerations: Develop a process that includes the would-be impacted staff to discuss the commitment; ensure that any offer of support is clear, equitable, and optional; expand beyond "subject matter expert input, technical data, and reporting assistance" to include non-technical support such as invitations to Midpen-hosted trainings and/or workshops, use of space, etc.; if a proposal is funded, ensure that staff will deliver to the grantee on all requests for support.

Area of Success 6: Awareness among Stakeholders.

Outcome 6.A. – No outcome presentations to board/staff by GMP staff and grantees have been made. RATING: 1

Recommendations:

- Remove the reference to making presentations as a "project deliverable" requirement in the grant agreement and consider including a statement of invitation. In practice, many grantees welcome the opportunity to present their work to a funder.
- Utilize the increased GMP capacity to schedule and support grantees to make presentations to board and staff; consider a more casual "lunch and learn" presentation format instead of, or in addition to, board presentations.

- Enable a process to collect outcome information from grantees and analyze that information for reporting to the board.

Outcome 6.B. – Grant outcomes and/or grantee stories are distributed electronically (on website and through newsletters) but the content is not easily accessible on the website and is not robust in newsletters. RATING: 2

Recommendations

- Work with Public Affairs to create greater visibility for/improve access to the GMP webpage.
- Develop with the Senior Grants Technician a workflow to regularly refresh the webpage.
- Consider proactively engaging with grantees to develop articles about their grant-funded activities.
- Request annual reports for 12 months from executed agreements, not annually in June.

Area of Success 7: Management System.

Outcome 7.A. – There are efficiency challenges with the current GMP data management system. The timeframe for proposal review has been hard for reviewers to balance with other responsibilities. Offers of extra support, through subject matter expertise and/or one on one application guidance, have been hard to follow through on. RATING: 2

Recommendations

- GMP staffing structure: Maintain the newly established 1 FTE for the Senior Grants Technician position; evaluate impacts of efforts to expand the responsibilities.
- Data management
    - Before the next RFP release,
        - Evaluate the demands on data and document management and assess the 'tipping point' for when a robust system should be implemented.
        - Initiate a review of grant award management systems.
- Proposal review process
    - Evaluate the application review process to
        - Explore the role of the GMP team as lead reviewers;
        - Assess the appropriate number of staff reviewers; and
        - Consider creating 'proposal portfolios' by funding priorities and assigning reviewers to the portfolio(s) that align with their area(s) of expertise.
    - Build more time for the entire RFP planning, release and grant agreement execution processes.
    - Explore if/how proposal reviewers should account for their time as part of the annual resource loading exercise.
    - Limit Tier 1 applicants' effort to only pre-proposals, as a strategy to reduce demands on GMP and Midpen reviewer staff time, in addition to serving as an equitable practice to reduce administrative burdens on applicants.

- Capacity building requests
    - Deepen GMP staff's understanding of the nature of the requests and the process of evaluating subject matter experts' availability to support such requests.

Outcome 7.B. – Midpen's grantmaking program is comparable/shares many similarities with its closest peer organization, Santa Clara Valley Open Space Authority (OSA), although a key exception is the funding levels. Midpen's allowable indirect rate is considered low within the grantmaking industry but is higher than OSA's. Rating: 2

Recommendations

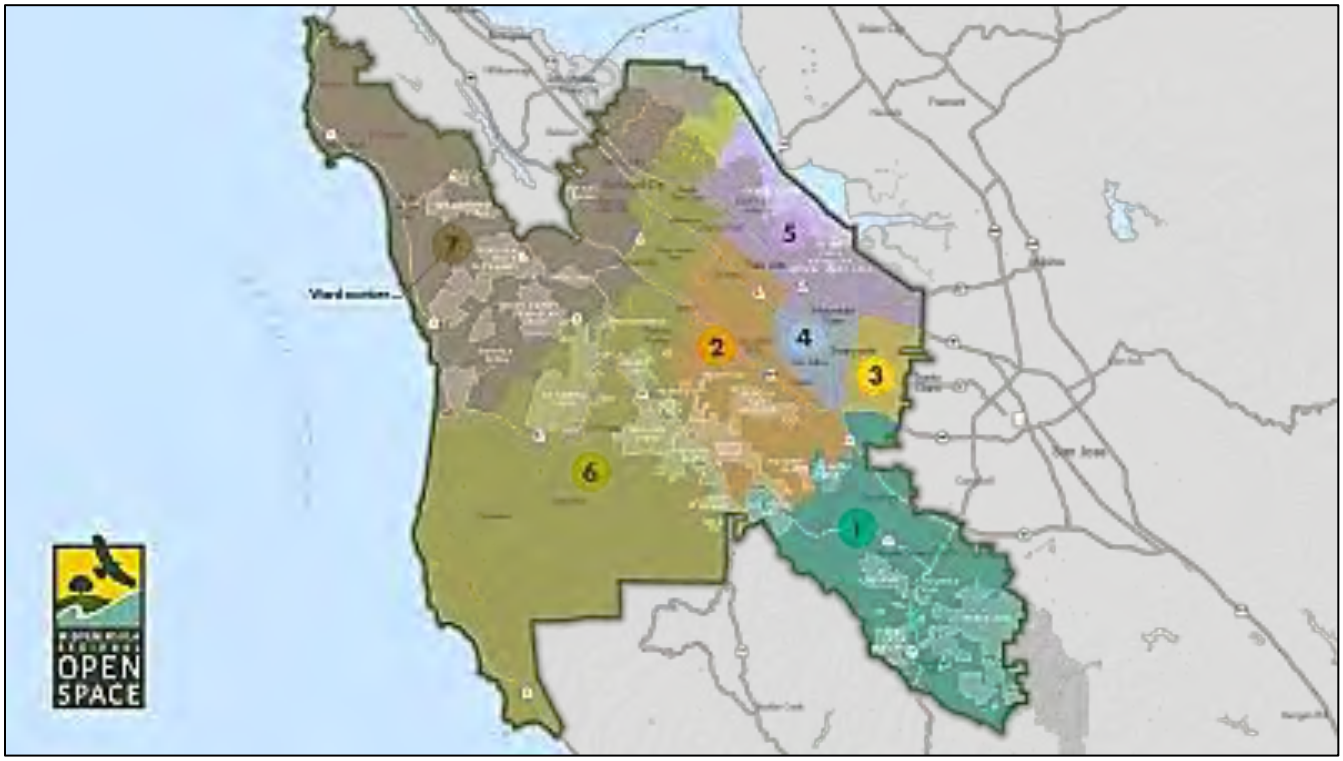
- Continue allowance for advance payments and no match requirement.
- Utilize the LFPAC study session to
    - Consider increasing the indirect rate allowance to a minimum of 15% (see Outcome 4.C. for discussion about indirect rate and organizational capacity).
    - Discuss the size of Midpen awards and the award budget
        - To help inform appropriate grant size, evaluate award amounts in light of the year over year increases in Midpen's property tax revenues and against peer grant makers.

Appendix 3 – Applicants and Grantees by Grant Cycles

Names of Applicant & Grantee Organizations	Type	2019	2021	2023
Amah Mutsun Land Trust	Applicant	x		
Bay Area Older Adults	Applicant	x		x
Bay Area Ridge Trail Council	Applicant			x
Bay Nature	Applicant		x	
Belmont Parks & Rec	Applicant		x	
Boys & Girls Club of the Coastside	Applicant			x
Canopy	Grantee			x
Climate Resilient Communities	Applicant			x
Coastside Land Trust	Grantee		x	
Coastside Land Trust	Applicant			x
Creekside Science	Grantee		x	
Dominican University/OHG Lab	Grantee		x	
Each Green Corner	Applicant			x
El Concilio of San Mateo County	Applicant			x
Environmental Volunteers	Applicant			x
Felidae Conservation Fund	Applicant		x	x
Filoli Center	Applicant		x	
Golden Gate and San Mateo MPA Collaboratives	Applicant			x
Golden Hour Restoration Institute	Applicant	x		
Grassroots Ecology	Grantee			x
Grassroots Ecology	Applicant	x		
Green Foothills	Applicant			x
Greenbelt Alliance	Applicant		x	
GreenTown Los Altos	Applicant			x
Groundswell Coast Ecology	Grantee	x		
Groundswell Coastal Ecology	Applicant		x	
Heirs to Our Oceans	Applicant		x	
Hidden Villa	Applicant	x	x	
Hidden Villa & Acterra	Applicant			x
Justice Outside	Applicant			x
Keep Coyote Creek Beautiful-Coyote Meadows	Applicant			x
La Honda Pescadero Unified School District	Applicant	x		
Latino Outdoors	Applicant	x		
LD Ford Rangeland Conservation Science	Applicant			x
Living Classroom	Applicant		x	
Marine Science Institute	Applicant	x		
Mike Kahn/Embracing the Bear	Applicant			x
Olimpico Learning	Applicant	x		
Pescadero Municipal Advisory Council	Applicant			x

Pie Ranch	Grantee		x	
Point Blue	Applicant		x	
POST	Grantee		x	
PUENTES	Applicant			x
Ridge Trail (Hwy 17)	Applicant		x	
Riekes Center for Human Enhancement	Applicant			x
San Francisco Bay Bird Observatory	Grantee	x	x	
San Jose Conservation and Charter School	Applicant	x		
San Jose Conservation Corps	Applicant			x
San Jose State University	Grantee		x	
San Mateo County Parks and Recreation Foundation	Applicant	x		x
San Mateo Resource Conservation District	Applicant	x	x	
Santa Cruz Mountains Stewardship Network	Applicant	x		x
Saved by Nature	Grantee			x
Sempervirens Fund	Applicant			x
SF Bay Bird Observatory	Applicant			x
SF Bay Bird Observatory and Sequia Consulting	Applicant			x
SF Bay Wildlife Society	Applicant			x
Siena Youth Center of St. Francis Center	Applicant	x		
Sierra Club Loma Prieta Chapter	Applicant			x
Strategic Energy Innovations	Applicant			x
Summit Public Schools	Applicant		x	
Sun + Earth Certified	Applicant			x
Tamien Nation	Grantee			x
The HEAL Project	Applicant			x
The Student Conservations Association	Applicant			x
Thrive Alliance	Grantee	x		
Thrive Alliance	Applicant		x	
TOGETHER Bay Area	Grantee			x
UC Davis	Applicant		x	
UC Elkus Ranch	Grantee		x	
UC Santa Cruz	Grantee	x		
Vida Verde Nature Education	Applicant			x
Vida Verde Nature Education	Grantee	x	x	
Walden West Foundation	Applicant		x	

Appendix 4 - District Wards Map



Appendix 5 – Peer Grantmaker Indirect Rates

Organization	Public	Private	Indirect Cost Rate
City of San Jose	X		15%
SF Bay Restoration Authority	X		15%
City of Santa Clara	X		15-20%
Valley Water	X		10%
Coastal Conservancy	X		20%
Calfire Wildfire Prevention	X		12%
FEMA/BRIC	X		15%
Hewlett		X	No limit
Packard Foundation Policy		X	No limit
Heising-Simons		X	15%
Ford Foundation		X	25%
Kresge		X	20%
MacArthur		X	29%

Midpeninsula Regional Open Space District

MIDPENINSULA REGIONAL OPEN SPACE DISTRICT

LEGISLATIVE, FUNDING, AND PUBLIC AFFAIRS COMMITTEE

Administrative Office
5050 El Camino Real
Los Altos, CA 94022

Tuesday, July 15, 2025

The Board of Directors conducted this meeting in accordance with California Government Code section 54953.

DRAFT MINUTES

CALL TO ORDER

Committee Chair Gleason called the meeting of the Legislative, Funding, and Public Affairs Committee to order at 2:00 p.m.

ROLL CALL

Members present: Craig Gleason, Karen Holman, Margaret MacNiven

Members absent: None

Staff present: General Manager Ana Ruiz, General Counsel Hilary Stevenson, Assistant General Manager Susanna Chan, Assistant General Manager Brian Malone, Chief Financial Officer/Director of Administrative Services Stefan Jaskulak, District Clerk/Assistant to the General Manager Maria Soria, Executive Assistant/Deputy District Clerk Stephanie Gross, Grants Program Manager Carol Schimke, Senior Grants Technician Caitlin Amarillas

Chair Gleason announced that the public has the opportunity to comment on the agenda, and the opportunity to listen to this meeting through the internet or via telephone. This information can be found on the meeting agenda, which was physically posted at the District's Administrative Office, and on the District website.

ADOPTION OF AGENDA

Motion: Director Holman moved, and Director MacNiven seconded the motion to adopt the agenda.

ROLL CALL VOTE: 3-0-0

ORAL COMMUNICATIONS

Public comment opened at 2:01 p.m.

Deputy District Clerk Stephanie Gross reported there were no public speakers for this item.

Public comment closed at 2:01 p.m.

COMMITTEE BUSINESS

1. Approve the May 20, 2025 Legislative, Funding, and Public Affairs Committee Meeting Minutes

Public comment opened at 2:01 p.m.

Ms. Gross reported there were no public speakers for this item.

Public comment closed at 2:01 p.m.

Director Holman requested that, on page two of the minutes, in the second to last paragraph, the phrase “for the employee” be revised to “by the employee” as the change alters the meaning of the sentence.

Chair Gleason requested that staff review the meeting recording and present revised minutes, if necessary, at the following Legislative, Funding, and Public Affairs Committee (LFPAC) meeting for approval.

2. Grantmaking Program Strategic Review and Recommendations (R-25-98)

Grants Program Manager Carol Schimke and Senior Grants Technician Caitlin Amarillas presented. General Manager Ana Ruiz and Chief Financial Officer/Director of Administrative Services Stefan Jaskulak assisted in answering questions.

Chair Gleason noted the change in full-time employment within the Grants Program and inquired about the impact of the Grantmaking Program review process on the organization.

Ms. Schimke responded that staff capacity outside of the Grants Program to support the Grantmaking Program is largely limited to the review period. During that time, staff from various departments are invited to participate, which has historically been an intense effort over several weeks. She noted that the goal moving forward is to distribute this work over a longer period to lessen the impact at any one time.

Chair Gleason inquired if the Grant Making Program is to be significantly expanded, will it be necessary to add additional staff not only in the Grants Program but also in other departments.

Ms. Schimke confirmed that additional staff would be needed.

Director MacNiven left the dais at 2:28 p.m. and returned at 2:30 p.m.

General Manager Ana Ruiz asked Ms. Schimke to track in detail the staff capacity required to run the Grantmaking Program, including the grants team and other staff who support the work. She noted that this information will provide a clearer understanding of whether there is available capacity to expand the program or if additional staff would be needed.

Director Holman suggested that in addition to increasing the funding, consideration should be given to setting a maximum number of grantees to make the program more manageable. She noted that focusing on fewer grantees may be more productive for both the District and the applicant.

Ms. Schimke responded that the applications increased by 90% from 2019 to 2023. To streamline the review process, staff is considering making the pre-proposal more robust for applicants applying for smaller Tier 1 grants, while requiring full proposals only for larger amounts. She noted that this approach would reduce the number of full proposals received.

Chair Gleason suggested that in the future, when the District has more staff capacity and can receive more grant applications, it would be beneficial to know how many grant awards would have been merited previously if sufficient staff capacity had been available.

Public comment opened at 3:10 p.m.

The following member of the public spoke in favor of the item:

- Stuart Weiss

Public comment closed at 3:14 p.m.

Chair Gleason commented that he supports the General Manager's recommendations, including having a focused impact statement. He noted that cities and other organizations are having challenges funding projects, and he believes there is an opportunity for the District to support projects outside District land and provide opportunities for the public to connect with nature close to their homes and schools. Additionally, he highlighted the potential to introduce a more diverse set of people to nature, encourage new experiences in the preserves, and to communicate the District's work. He clarified that he is not suggesting a specific timeline or scope but is interested in whether there is a forum for the Board to discuss this potential direction.

Ms. Ruiz responded that the proposal by Director Gleason requires a policy level discussion. She stated that an expansion would need to have a nexus to the District's mission and the work would need to fall withing the District's jurisdiction. She added that aside from what is possible through the Grantmaking Program, the District can also pursue partnership agreements. She stated the idea could be presented at the next Board meeting if there is a committee consensus, and if the majority of the Board expresses interest, the topic could be discussed at the Board's annual strategic planning retreat in December.

Director Holman expressed her support for Chair Gleason's recommendation and mentioned that a nexus to the District's mission could be established through connectivity and migration routes.

Director MacNiven commented that she is not opposed to a discussion but also recognizes the policy considerations the District would face if the program were expanded.

Director Holman suggested that the District could serve as a strategic partner, as cities may not have the staff expertise to help educate the public on specific natural resource and land conservation topics, whether within the District's jurisdiction or beyond.

Chair Gleason commented that he would coordinate with Ms. Ruiz to present the item to the full Board to determine if there is interest in a Board discussion.

Director MacNiven suggested including 4-H and Future Farmers of America at Half Moon Bay High School in notifications for future Grantmaking opportunities, noting that a grant would provide significant support for these type of groups.

Motion: Director Holman moved, and Director MacNiven seconded the motion to:

1. Forward to the full Board of Directors for consideration and approval three recommended updates to Board Policy 3.10, *District Grantmaking Program*:
    a. Increase the Grantmaking Program award budget from $250,000 to $300,000, with an increased grant award size in each tier: Tier 1 from $25,000 to $30,000 and Tier 2 to $50,000 to $60,000.
    b. Limit the grantee reimbursement period to a maximum of two years to align with the biennial (every two years) Grantmaking Program cycle and the corresponding release of a new Request for Proposals.
    c. Adopt the recommended Funding Priority descriptive updates.
2. Forward the Committee's selection of Option 2 below to the full Board of Directors for consideration and approval to establish a Grantmaking Program impact statement for inclusion in Board Policy 3.10, *District Grantmaking Program*
    - Option 2: Support Early-Stage and Grassroots Initiatives

ROLL CALL VOTE: 3-0-0

ADJOURNMENT

Chair Gleason adjourned the meeting of the Legislative, Funding, and Public Affairs Committee at 3:29 p.m.

Stephanie Gross
Deputy District Clerk

Maria Soria
District Clerk

Midpeninsula Regional
Open Space District

R-25-115
Meeting 25-24
August 27, 2025

AGENDA ITEM 6

AGENDA ITEM

Amend the Midpeninsula Regional Open Space District's Classification and Compensation Plan for Compensation Study adjustments based on the updated Compensation Philosophy

GENERAL MANAGER'S RECOMMENDATION

Adopt a resolution amending the District's Classification and Compensation Plan for Compensation Study adjustments based on the updated Compensation Philosophy.

SUMMARY

This report outlines proposed amendments to Midpeninsula Regional Open Space District's (District) Classification and Compensation Plan to align salary ranges with the recently updated Compensation Philosophy, which the Board of Directors (Board) approved in January 2025. The updated philosophy defines a competitive salary as the median plus 10 percent of comparable positions across a newly approved list of 15 public agencies in the nine Bay Area counties and Santa Cruz County.

These adjustments reflect the District's ongoing efforts to maintain competitive compensation that supports effective recruitment, retention, and staffing needed to fulfill its mission. Initial adjustments to the plan were presented to, and unanimously approved by, the Action Plan and Budget Committee (ABC) on July 8, 2025.

After that approval, new data emerged that could affect some of the original findings. In response, the Human Resources (HR) team worked with the consultant to re-evaluate and confirm the results of all classifications studied. Additionally, employee feedback received through July 18, 2025 (including the ABC meeting) was shared with Gallagher for review. This report presents the updated findings and proposed changes based on that reanalysis.

DISCUSSION

Background

The District's mission is to acquire and preserve a regional greenbelt of open space land in perpetuity, protect and restore the natural environment, and provide opportunities for ecologically sensitive public enjoyment and education. On the coastside, this mission is expanded to include the preservation of agricultural lands of significance, protection of rural character, and encouragement of agricultural use of land resources. The District relies on a dedicated professional staff to fulfill this mission and recognizes the importance of offering competitive compensation and benefits to attract and retain top talent.

In March of 2015, the Board first adopted the *Employee Compensation Guiding Principles* (R-15-43, minutes) and established a philosophy to maintain "competitive compensation" as a tool to attract and retain high-quality employees. A key element of the policy includes a Board-directed definition of what constitutes competitive public sector compensation for each classification.

In response to more recent recruitment and retention struggles affecting turnover, the success of filling new positions, and the number of qualified applicants received per recruitment cycle, the Board in January 2025 approved revisions to the *Employee Compensation Guiding Principles* (R-25-18, minutes). Key elements of the policy update include:

- When comparing to comparator agencies using "top-range salary", define a competitive salary as median plus 10 percent.
- Granting the General Manager the authority to adjust base wages for classifications to allow for appropriate internal alignment between classifications so long as those wages are not below median plus ten percent of the comparator agencies.
- Eliminated the 60th percentile cap and the practice of Y-Rating employees (not applying any base wage adjustments to an employee until comparable agency salaries have caught up and the employee's salary again falls within the appropriate salary range, which typically happens over a few years).

Additionally, the Board set the District's updated comparator agencies list to include the following 15 agencies, which are all located within the nine Bay Area counties plus Santa Cruz County.

- City and County of San Francisco (Park and Rec & PUC)
- City of Mountain View
- City of Palo Alto
- City of San Jose
- City of Santa Cruz
- County of Marin
- County of San Mateo
- County of Santa Clara
- County of Sonoma
- East Bay Municipal Utility District
- East Bay Regional Park District
- Hayward Area Recreation District
- Marin Municipal Water District
- Santa Clara Valley Open Space Authority
- Santa Clara Valley Water District

Compensation Studies to Establish the New Classification and Compensation Schedule

The human resources firm, Gallagher, was selected through a competitive Request for Proposal (RFP) process to conduct a compensation study on all benchmark positions based on the recently updated compensation philosophy and new comparator agencies list to then establish the new, revised Classification and Compensation Plan. The Classification and Compensation Plan outlines the salary range for each classification, with information on hourly, monthly, and annual pay for the minimum (starting) and maximum (ending) range of each classification.

A compensation study is the process of thoroughly reviewing comparator agencies' compensation (salary and benefits) for the same or similar classifications (positions) and comparing this information against the current salary ranges and internal compensation policies for District classifications. To maintain the overall credibility of the compensation studies, Gallagher relied on the District's classification descriptions as the foundation for comparison.

When Gallagher researches and collects data from the comparator agencies to identify possible matches for each of the benchmark classifications, there is an assumption that comparable matches may not always be made that are 100% equivalent to the classifications at the District. Therefore, Gallagher does not match based upon job titles, which can often be misleading, but rather analyzes class (job) descriptions before a comparable match is determined. Gallagher's methodology is to analyze each class description and the whole position by evaluating factors such as:

- Definition and typical job functions;
- Distinguishing characteristics;
- Level within a class series (i.e., entry, experienced, journey, specialist, lead, etc.);
- Reporting relationship structure;
- Education and experience requirements;
- Knowledge, abilities, and skills required to perform the work;
- Scope and complexity of the work;
- Independence of action/responsibility and level of accountability;
- Authority delegated to make decisions and take action;
- Responsibility for the work of others, program administration, and for budget dollars;
- Level of decision-making in personnel management, hiring, and recruitment;
- Lead management of specific program areas;
- Number of supervisees;
- Problem solving/ingenuity;
- Contacts with others (both inside and outside of the organization);
- Consequences of action and decisions/delegated level of risk management; and
- Working conditions.

In order for a match to be included, Gallagher requires that a classification's "likeness" be at approximately 70% of the matched classification.

When an appropriate match is not identified for one classification, Gallagher often uses "hybrids", which can be functional or represent a span in scope of responsibility. A functional hybrid means that the job of one classification at the District is performed by two or more classifications at a comparator agency. A "hybrid" representing a span in scope means that the comparator agency has one class that is "bigger" in scope and responsibility and one class that is "smaller," where the District's class falls in the middle.

If an appropriate match is not found, then a "no match" is reported as non-comparable (N/C).

In order to calculate median salary, Gallagher requires that there be a minimum of four comparator agencies with matching classifications to the benchmark classification. The reason for requiring a minimum of four matches is so that no one classification has undue influence on the calculations.

Gallagher conducted compensation studies for 60 (benchmarks) of the District's 95 classifications, including classifications represented by the Field Employees Association and by the Midpeninsula Rangers Peace Officers Association. All other classifications are internally aligned to these 60 classifications. Excluded from the studies were the Board-appointed positions

of General Manager, General Counsel, and Controller as they have individual contracts. The results of the compensation studies for the 60 benchmark classifications are as follows:

- 52 classifications came in below the new competitive salary definition of median plus 10 percent
- 2 classifications came in above median plus 10 percent
- 3 classifications had insufficient data (less than four matches with comparator agencies)
- 3 classifications are new, and as of the study, did not yet have a defined District compensation salary range to compare to the market:
    - Land Stewardship & Trails Manager
    - Facilities and Fleet Manager
    - Fleet Services Specialist
- For the 54 classifications with results (excluding those with insufficient data and new classifications), the average was 11.7 percent below median plus 10 percent

Additionally, Gallagher provided appropriate salary range placement recommendations based on the market studies. Internal equity between certain levels of classifications is a fundamental factor to consider when making compensation decisions. When conducting a labor market compensation survey, results from the comparator agencies for a specific classification can be misaligned when comparing this result against the larger suite of classification families at the District. As such, careful consideration was given to these internal alignments to maintain a proper separation between classifications within job families. The most common internal percentage differentials applied and recommended by Gallagher as standard practice are:

- 10% between entry and journey level positions and Leads (such as I/II/III and Lead)
- 15% between levels when the higher level supervises multiple employees and/or manages a discreet program (such as Senior and Supervisor)
- 15-20% between the highest level supervised and the management level

Staff spent significant time reviewing the individual study results with Gallagher and analyzing the data. Based on the study results and adjustments to maintain appropriate internal alignment, the range placement recommendations resulted in the following for all 95 classifications:

- 87 classifications (of 92, excluding 3 new classifications – or 95% of classifications) are recommended for a salary range increase, including intern and seasonal classifications, either because they fell below the median plus 10 percent target and/or to ensure proper internal alignment within classification families
- Five classifications would remain status quo, staying at their current range
    - One benchmark is at median plus 10: Property Management Specialist II
    - One position is not in use and will be studied through an upcoming classification study to confirm its function and salary range: Data Administrator
    - Two benchmarks above median plus 10 are recommended to be studied once vacant to determine if they need to be adjusted down at that time:
        - Environmental Education Specialist
        - Interpretive Specialist
    - One internally aligned classification, Senior Property Management Specialist, is recommended to be adjusted down two ranges once vacant, so that it is 15%

above the benchmark position of Property Management Specialist II rather than the current 20%

- The average increase of these 87 classifications is 10.2%

Reanalysis and Employee Feedback Review following the July 2025 ABC Meeting

After the ABC unanimously approved the recommended changes to the classification and compensation plan on July 8, 2025, new data emerged that could affect some of the original findings. In response, the HR team worked with the consultant to re-evaluate and confirm the results of all classifications studied. Additionally, employee feedback received at the ABC meeting and through July 18, 2025 was shared with Gallagher for review.

Capital Project Manager II:

A re-analysis of the compensation study results for Capital Project Manager II identified two corrections in the comparable agency matches that revise the original range placement recommendation presented at ABC meeting. The new, revised salary range for Capital Project Manager II now moves the range from the current 36 to 39 due to the following:

- The match at County of Marin was removed because it is a full cycle project manager, whereas the District's Capital Project Managers carry projects from preliminary and final design through construction and closeout. As such, it did not meet the threshold of 70% likeness.
- The match at City of Palo Alto was changed from a hybrid match of Coordinator, Public Works Projects and Project Manager to Coordinator, Public Works Projects only. The Project Manager is a supervisory classification, overseeing division operations, the Coordinator Public Work Projects supervises contractors and inspects their work. The supervisory position that has responsibility for multiple in-house positions does not meet the threshold of 70% likeness, whereas the coordinator with responsibility for oversight of contract staff and coordination of projects does.

Based on the reanalysis and revised market median +10%, the range placement recommendations changed as follows:

Classification Title	Current Range #	Current Hrly Max	Revised Proposed Range #	Revised Hrly Max	Prior ABC Proposed Range #	Difference
Capital Project Manager I	32	62.3479	35	67.0907	36	-1
Capital Project Manager II	36	68.7325	39	73.9617	40	-1
Capital Project Manager III	40	75.7781	43	81.5622	44	-1
Senior Capital Project Manager	44	83.5459	49	94.415	50	-1

Planner II:

The request from the Planners in their public comment letter dated July 7, 2025 (Attachment 1) and at their public comments at the July 8, 2025 ABC meeting was to reevaluate the comparable matches found for Planner II and add in project manager classifications as a functional hybrid.

Gallagher reviewed the current matches at the comparator agencies and did not agree that revising the matches to include hybrid matches is appropriate. In the market, project management typically includes managing projects through the entire life cycle from conception,

preliminary and final design, construction/implementation, and closeout. Midpen's Planners manage projects from concept to preliminary design, including environmental review and clearance, and then hand off the project to Capital Project Managers to carry the project from preliminary and final design through construction and finally closeout. Both Midpen Planners and Capital Project Managers manage consultants/contractors during their respective portions of managing assigned projects. However, the market tends to compensate for project management roles involved in final design through construction and closeout at a higher rate, reflecting the increased technical complexity, risk, construction management, and resource coordination required during these phases.

In looking at market practices, there were seven comparator agencies with comparable classifications to both Midpen's Capital Project Managers and Planners. Of the seven agencies, four agencies compensate the comparable classification to the Capital Project Manager II more than the comparable classification to Planner II; and at three agencies the comparable classification to Planner II is compensated higher than the comparable classification to Capital Project Manager II. Thus, there is no consistent practice in the market regarding alignment between the classification series.

No changes were made to the Planner II compensation study as a result of the reanalysis.

Classification Title	Current Range #	Current Hrly Max	Revised Proposed Range #	Revised Hrly Max	Prior ABC Proposed Range #	Difference
Planner I	29	57.9547	33	63.9061	33	0
Planner II	31	60.8504	37	70.4504	37	0
Planner III	39	73.9617	41	77.6785	41	0
Senior Planner	43	81.5622	47	89.9229	47	0

Resource Management Specialist II:

The request from the Resource Management Specialists in their public comment letter dated July 7, 2025 and submitted one day prior to the ABC meeting (Attachment 1) was to reevaluate the comparable matches for the City and County of San Francisco. Furthermore, the department manager also submitted comments to reevaluate the City of Mountain View match and the City of San Jose match.

Based on reanalysis of the market data, Gallagher agrees that the Biologist at City and County of San Francisco is a better comparison to Midpen's Resource Management Specialist as compared to the Natural Resource Specialist.

Additionally, for the City of Mountain View, Wildlife Preservation Coordinator position, it is noted in feedback provided by the department manager as a more focused position than the District classification. This match was originally included as it has responsibility for field surveys, wildlife preservation planning, regulatory compliance reporting and compliance, and budget tracking, bid and contractor responsibilities, and community liaison responsibilities. As this is a stand-alone position in the department and is singularly focused on wildlife preservation versus the broader benchmark of the Resource Management Specialist classification, this prior match was subsequently removed.

Finally, for the City of San Jose, Environmental Services Specialist series, this is a broad classification used in several departments. Gallagher can confirm that this classification is allocated to the Parks, Recreation, and Neighborhood Services Department at the supervising level from the City's Fiscal Year 2024-25 operating budget. Based on the job description, and the allocation of this classification to Parks, Gallagher feels it is a comparable match at the journey level.

Based on the reanalysis and revised market median +10%, the range placement recommendations changed as follows:

Classification Title	Current Range #	Current Hrly Max	Revised Proposed Range #	Revised Hrly Max	Prior ABC Proposed Range #	Difference
Resource Management Specialist I	30	59.3759	33	63.9061	32	+1
Resource Management Specialist II	34	65.4641	37	70.4504	36	+1
Resource Management Specialist III	39	73.9617	41	77.6785	40	+1
Senior Resource Management Specialist	43	81.5622	47	89.9229	46	+1

Gallagher also looked at the internal relationships between the Resource Management Specialist classifications compared to the Planner classifications at those agencies that had a comparable match to the District's classifications. Market practices vary in that, at the seven agencies that had comparable matches to both classifications:

- Two compensated the match to the Resource Management Specialist more than the Planner match;
- Three compensated the match to the Resource Management Specialist less than the Planner match; and
- One compensated the match for the Resource Management Specialist the same as the Planner match.

Thus, there is no consistent practice in the market regarding alignment between the Resource Management Specialist and Planner classification series.

Planning Manager:
The data point for City of Santa Cruz, hybrid match, was not reported correctly. In the revised recommendations, the Planning Manager is recommended to be placed in salary range 57 based on the market (previously was recommended for placement in salary range 56).

Classification Title	Current Range #	Current Hrly Max	Revised Proposed Range #	Revised Hrly Max	Prior ABC Proposed Range #	Difference
Planning Manager	51	99.1349	57	114.7618	56	+1

The data and rationale for all the recent changes were shared and discussed with staff in advance of the Board meeting. Furthermore, these changes are included in the new proposed Classification and Compensation Plan (refer to Attachment 2).

Other:
Six additional staff members provided feedback on their classification studies. Concerns primarily focused on comparator match accuracy, the inclusion of specialized job duties, and how longevity or broad salary ranges were reflected in the reported benchmarks. Staff also sought clarification on positions with unique responsibilities or limited available market comparators.

Gallagher reviewed all feedback and reaffirmed their methodology, which prioritizes position-based comparisons (not individual incumbents), a minimum 70% job match threshold, and consistent exclusion of longevity or specialty pay in reported salaries. Where direct market matches were unavailable, Gallagher used internal alignment or hybrid comparisons to ensure role scope and responsibilities were appropriately reflected. Their responses provided detailed rationale for each decision and emphasized consistency in approach across all positions. Gallagher's responses were shared with staff directly. Based on this review, no changes have been made to the initial compensation recommendations for these classifications.

Implementation

It is important to note that updates to the District's Classification and Compensation Plan for compensation study adjustments based on the updated compensation philosophy will not result in an automatic increase to an individual employee's compensation. The compensation survey results will be used to reassign a classification to a new salary range in the classification and compensation plan. How these changes apply to individual employees are explained in the following two outcomes:

- When the salary survey shows compensation is **at or above the new compensation philosophy target** – no equity adjustment is needed, and no Y-rating will be made to an *individual employee*. Instead, active employees will continue to be eligible for all applicable pay practices (base wage adjustments, merit (step) increases, longevity, etc.)

- When the salary survey shows compensation is **below the new compensation philosophy target** – an equity adjustment will be applied to the classification (the classification will be assigned a new salary range, for example, move from range 30 to range 32). Individual employees will be moved to the step in the new range closest to, but not less than, their current hourly rate. Employees continue to be eligible for base wage adjustments & merit (step) increases (which are normally 2.5% to 5% for employees who meet performance standards). An employee who is currently eligible for longevity pay or meritorious pay and is moved from step 10 to a lower step in the new range will once again be eligible for longevity pay or meritorious pay once they reach step 10 as the top step of their salary range. As a reminder, both longevity pay and meritorious pay serve as retention tools that provide eligible employees with a one-time, lump sum amount once they reach top step, recognizing that these employees can no longer receive annual merit (step) increases.

Both the Field Employees Association (FEA) and the Peace Officers Association (POA) were notified in early July of the recommended adjustments to compensation. The current MOU between the District and FEA was approved by the Board in June 2024 (effective July 1, 2024 to June 30, 2027) and the current MOU between the District and the POA was approved by the Board in October 2023 (effective July 1, 2023 to June 30, 2027). The FEA has the following language in their MOU under Article 7 – Compensation and Benefits: "The District shall initiate meet and confer with the FEA for the purpose of negotiating a possible salary increase if the District changes its compensation policy during the term of this agreement (July 1, 2024 through June 30, 2027)." The POA does not have any language in their MOU regarding a possible compensation increase as a result of the updated compensation philosophy. The General Manager proposes applying the proposed salary increases to the FEA and POA as shown in Attachment 2. Both FEA and POA presidents confirmed agreement and acceptance of the proposed compensation changes. Both represented groups will receive side letters to their respective MOUs, upon Board approval.

Pending Board approval, staff will apply the updates effective the first full pay period after Board approval, or pay period 25-19, with an effective date of September 1, 2025 and pay date of September 19, 2025.

FISCAL IMPACT

The first-year fiscal impact is estimated at $1.2 million, with the second-year estimate at $2.2 million after which it levels off at approximately $3 million per year. At this time, a budget adjustment will not be requested since the impact is less than what the annual salary savings has been for the past several years.

The information presented in this report was shared and discussed with the Controller during early phases of the salary survey evaluations and cost projections, who did not raise a concern regarding the fiscal affordability of the changes. Moreover, the salary changes are now built into the District's 30-year fiscal model and are financially sustainable over the long-term.

PRIOR BOARD AND COMMITTEE REVIEW

- **September 25, 2024**: Board Received a Compensation Philosophy Informational Presentation (R-24-120, minutes)
- **December 10, 2024**: Action Plan and Budget Committee Received Additional Information and Analysis for, and Recommended Amendments to, the Compensation Philosophy (R-24-145, minutes)
- **January 22, 2025**: Board Adoption of the revised Board Policy 2.03 *Employee Compensation Guiding Principles*, also referred to as the "compensation philosophy" (R-25-18, minutes)
- **July 8, 2025**: Action Plan and Budget Committee approval of Amendments to the Midpeninsula Regional Open Space District's Classification and Compensation Plan Reflecting Compensation Study Adjustments Based on the Updated Compensation Philosophy and Comparator Agencies List (R-25-87, for draft minutes refer to Attachment 3)

PUBLIC NOTICE

Public notice was provided as required by the Brown Act. All District employees were also informed of this meeting and provided a copy of the report.

CEQA COMPLIANCE

This item is not a project subject to the California Environmental Quality Act.

NEXT STEPS

Upon Board approval, HR staff will provide individual employees with an email detailing their specific new salary range and step change, and implement all changes effective September 1, 2025. Additionally, the District will execute a side letter with both the FEA and POA for these changes. Employees have until August 30, 2025 to provide any new feedback on these changes to HR staff. If this feedback warrants any additional adjustment(s) to the Classification and Compensation plan, HR staff is prepared to go back to the Board after August 30, 2025 with any subsequent recommendations.

Attachments

1. Public Comments received from Planners and Natural Resources
2. Resolution Adopting Amendments to the District's Classification and Compensation Plan for Compensation Study Adjustments Based on the Updated Compensation Philosophy Effective September 1, 2025
3. Draft Minutes July 8, 2025: Action Plan and Budget Committee approval of Amendments to the Midpeninsula Regional Open Space District's Classification and Compensation Plan Reflecting Compensation Study Adjustments Based on the Updated Compensation Philosophy and Comparator Agencies List

Responsible Department Head:
Stefan Jaskulak, Chief Financial Officer/ Director of Administrative Services

Prepared by:
Rebecca Wolfe, Human Resources Supervisor

Contact person:
Candice Basnight, Human Resources Manager

Midpeninsula Regional Open Space District

Memorandum

DATE: July 7, 2025

MEMO TO: Midpen Board of Directors and Action Plan and Budget Committee

FROM: Senior Planner: Gretchen Laustsen, Tina Hugg, Jared Hart
Planner III: Galli Basson, Ashley Mac, Erica Strohmeier, Tyler Smith, Melissa Borgesi
Planner II: Mattea Ottoboni, Brittany Wheatman, Cecelia Gerstenbacher
Planner I: Alyssa Cano

SUBJECT: Planning staff response to Planner II benchmarked positions in updated 2025 Benchmark Compensation Study and **request for a functional hybrid match for an accurate benchmark comparison**

Thank you for the opportunity to provide comments on the updated results of Gallagher's 2025 Compensation Study for the Planning department that were based on the Planner II job description currently being finalized as part of the 2024-25 Planning Department Classification Study. We would like to begin by extending our gratitude to the Board for supporting the request for a classification study, the General Manager's Office for implementing it, and to Human Resources staff for administering it.

The Classification Study for both Planning and Engineering & Construction started in late November 2024. Planning staff answered position description questionnaires (PDQs) on detailed job duties and responsibilities by position level (I, II, III, Senior), which were reviewed by supervisors and the department manager before being sent to Gallagher in mid-March 2025. Gallagher interviewed planners by position level in early April. Planners received their draft job descriptions from Human Resources staff on June 11th and returned feedback on June 23rd. The job descriptions are currently being finalized. Human Resources staff provided Planning's draft Compensation Study results to staff on June 25th. Given the fast turnaround times, Planning's analysis below is limited to three of the comparators in order to provide timely comments to the Action Plan and Budget Committee for their July 8th meeting.

While we are truly grateful for the opportunity afforded to us and substantially agree with the more accurate job descriptions currently in final review, we are simultaneously disappointed with the comparables and associated results of the 2025 Benchmark Compensation Study, which concluded that none of the benchmarked positions in comparable agencies retained from the 2023-24 effort have changed. As you recall from previous correspondence, Planning staff had asked for more comparable positions that are broader than traditional municipal planning positions. Further, the new benchmarked positions for the new comparable agencies have similar municipal planning-only function characteristics. For the purpose of this memo, Planning analyzed the comparable positions for both Midpen's Planner II and Capital Project Manager (CPM) II from the County of San Mateo (existing comparator agency), the County of Santa Clara (existing comparator agency), and the City of San Jose (new comparator agency) to demonstrate how the Midpen Planner II position include functions and qualifications of both Planner II and CPM II comparable positions.

Comparator Agency	New Comparator	Classification Title
City of Santa Cruz	Yes	Associate Planner II
Sonoma County Agricultural Preservation and Open Space District	Yes	Park Planner II
City of Mountain View	Yes	Associate Planner
Santa Clara Valley Water District (Valley Water)	No	Assistant Environmental Planner II
Santa Clara Valley Open Space Authority	No	Associate Open Space Planner
City of Palo Alto	No	Associate Planner
East Bay Regional Park District	No	Planner
City and County of San Francisco	Yes	Planner II
City of San Jose	Yes	Planner II
County of Marin[1]	No	Open Space Planner/Senior Open Space Planner
County of Santa Clara	No	Associate Planner
County of San Mateo	No	Planner II
East Bay Municipal Utility District	Yes	N/C
Hayward Area Recreation and Park District	Yes	N/C
Marin Municipal Water District	No	N/C

1 - County of Marin: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower-level classification at the comparator agency. The salary displayed is an average of the matches.

Planning staff's concerns are summarized as follows:

1. The Planner II job description is currently being revised as part of the Classification Study to include and recognize capital project management functions in addition to planning duties. Despite these changes, the Planner II continues to be compared to the same planner positions from the prior Compensation Study who do not perform capital project management duties.

2. As shown in the Midpen planner-to-comparable planner and CPM comparison Tables 3.1, 4.1, and 5.1 in **Attachments 3, 4 and 5**, Midpen Planner II duties include functions not only of the comparable planner but also those of the comparable capital project manager position used for Midpen CPM IIs. As noted in our prior comment memos (March and June 2024, **Attachment 7**), the Midpen Planner II job description includes and matches many planning functions but also includes and matches many capital project manager functions. Planning staff analyzed three comparator agency positions (San Mateo County, Santa Clara County, and City of San Jose) that sufficiently illustrate how the Midpen Planner II functions and qualifications overlap those of both Planner II and CPM II's comparable positions.

3. The 70% match comparison should go both ways in order to accurately encompass **all of** Midpen Planner II responsibilities. Midpen's Planner II may match 70% of a comparable planner but if that comparable planner has no capital project management duties (see Midpen planner-to-comparable planner comparison Tables 3.2, 4.2, and 5.2 in **Attachments 3, 4 and 5**) the match is not complete and another job should be considered to fully characterize all duties a Midpen Planner II is expected to perform. Otherwise, a significant portion of Midpen Planner IIs' primary job responsibilities will be unrecognized and unaccounted for. **This is why a functional hybrid was suggested in Planning staff's prior comment letters along with suggested comparable positions (Attachment 7).**

4. If Midpen is unwilling to consider a functional hybrid match using positions within the comparator agencies, Planning staff request a better internal and equitable alignment with Midpen's Capital Project Manager series, given that **the Planning department leads projects that directly feed into and overlap with the Engineering & Construction Department's workload pipeline** (e.g. Skyline Field Office, La Honda Parking and Trailhead, Purisima-to-the-Sea Verde Road, Hawthorns Area Plan, Hawthorns Historic Complex, etc.). As noted in the Midpen Planner II-to-Midpen CPM II table in **Attachment 2**, Midpen Planner II responsibilities significantly overlap with Midpen CPM II.

5. During the Gallagher interviews with Planning staff, the consultant acknowledged the challenge of and inability to find matches in the public sector because Midpen planners are unique and perform project management functions not found in traditional planning positions.

6. Prior to 2014, Midpen's Planning department managed projects from beginning to end, from scoping to construction. In 2014, the Board approved the Financial and Operational Sustainability Model (FOSM) which split capital project delivery and formed two separate departments (Planning and Engineering & Construction) to allow Midpen to scale up productivity. This effectively separated scoping, programming, planning, public engagement, early design (conceptual and schematic level) and environmental review from final design, permitting, bidding, and construction (see Public Access Project Delivery Process in **Attachment 1**). Planning therefore should be recognized for its role in project delivery, which requires the lion's share of the project timeline and includes duties and responsibilities beyond a municipal planner.

7. As evidenced by Planning-led projects the Board has seen over the last few years (e.g. Skyline Field Office, La Honda Parking and Trailhead, Purisima-to-the-Sea Verde Road, Hawthorns Area Plan, Hawthorns Historic Complex, etc.), these capital projects are exposed to a high level of complexity, risk and potential for failure in the early stages of delivery, where public sentiment, early identification of site constraints, and political challenges can influence a project's viability. Planners are responsible for shepherding capital projects through these challenging phases of work and should be recognized for their capacity to handle and manage risk.

In summary, we are thankful to the Board, General Manager's Office, and Human Resources Department for implementing the Planning Department Classification Study. We are simply disappointed that our prior concerns are not resolved (see June 2024 memo in **Attachment 7**). To be put plainly, Planning staff do not disagree that Midpen's planner classifications match many municipal planners' responsibilities. The point we are making is that municipal planners' classifications do not match us, and that using only their positions as our matches leaves out capital project management, which is a significant portion of the work we are expected to perform, by not only the Board and General Manager's Office, but by the very nature and structure of Midpen's unique project delivery process. We ask that Midpen Planners be acknowledged for the unique hybrid function we perform, and that our comparable positions and compensation accurately reflect what we do. We thus respectfully request again that Midpen re-visit the Planner II comparable matches and consider using a functional hybrid match, or span of responsibility match, or making a better internal and equitable alignment with Engineering & Construction counterparts.

Thank you for your consideration.

Respectfully submitted,

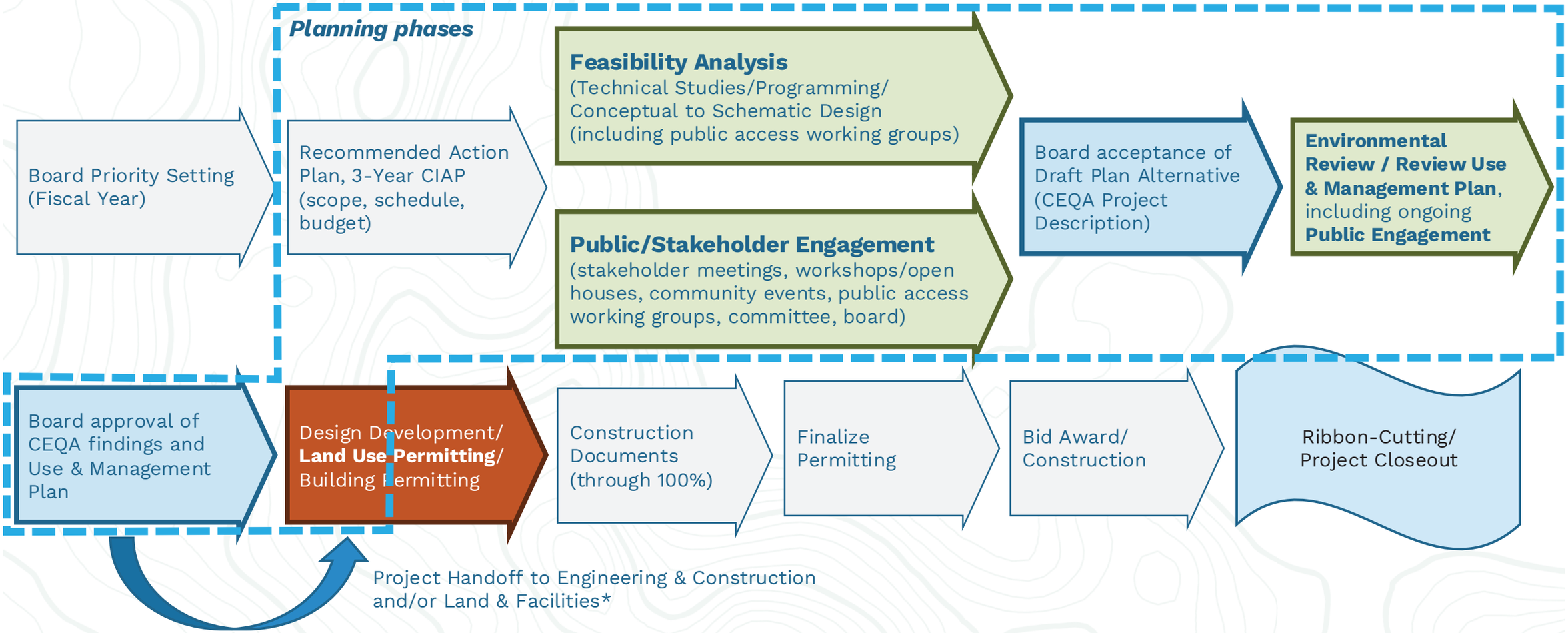
Planning Department staff

Attachments:
1. Public Access Project Delivery Process
2. Comparison Table – Midpen Planner II with Capital Project Manager II
3. Comparison Tables – Midpen Planner II with San Mateo County comparables
4. Comparison Tables – Midpen Planner II with Santa Clara County comparables
5. Comparison Tables – Midpen Planner II with City of San Jose comparables
6. Annotated Comparator Agency job descriptions
7. June 24, 2024 memo with March 4, 2024 memo attachments

CC: Ana Ruiz, General Manager
Susanna Chan, Assistant General Manager
Jane Mark, Planning Department Manager
Candice Basnight and Rebecca Wolfe, Human Resources

ATTACHMENT 1

Public Access Project Delivery Process



**Planning stays involved for Land Use Permitting (e.g. Bear Creek Stables or La Honda Event Center Resource Management Permit)*

Attachment 2

This table compares the job functions performed by the Midpen Planner I-II and Capital Project Manager I-II using the latest draft job descriptions provided. The comparison demonstrates that each department has unique expertise and focus relevant to their specific role and phase in the project delivery process **but overlap in significant job functions related to project management and delivery**. Planning leads public access projects in scoping, programming, planning, public engagement, early design (conceptual and schematic level) and environmental review after which projects transition to Engineering & Construction who leads final design, permitting, bidding, and construction.

(A) Midpen: Planner I-II *06/11/25 HR-provided draft job description*	**(B) Midpen: Capital Project Manager I-II** *06/11/25 HR-provided draft job description*	**(C) Analysis of CPM I-II Duties and Overlap with Planner I-II**
Planner I-II job duties are identified by PL and corresponding number (e.g. PL1) in Analysis of CPM I-II Duties column	CPM I-II job duties are identified by CM and corresponding number (e.g. CM1) in Analysis of CPM I-II Duties column	Numbers in parenthesis refer to the planning duty that aligns with the CPM duty (e.g., PL1)
1. Participates in the scoping, planning, programming, conceptual and schematic design development, land use permitting, and environmental review of capital improvement projects related to public access, new trails and trailheads, parking lots, buildings, facilities, and other District infrastructure. 2. Manages assigned projects, developing, tracking, and reporting project scopes, schedules, and budgets; participates in the preparation of project implementation budgets, monitors and approves project expenditures, and processes project invoices. 3. Participates in the development of consultant requests for proposals for professional services and the advertising and bid processes; evaluates proposals and recommends project award; coordinates with legal counsel to determine District needs and requirements for contractual services; negotiates contracts and agreements and administers same after award. 4. Reviews documents, reports, and work products prepared by consultants and provides feedback and revisions of work products including feasibility studies, basis of design, concept and schematic design plans, detailed design drawings, environmental review documents, historical resource evaluations, transportation demand management studies, and other technical studies; facilitates review across multidepartment project team. 5. Conducts and/or assists with the California Environmental Quality Act (CEQA) analysis of capital improvements, facilities, maintenance activities, land purchases, and proposed new public uses of District lands; reviews and prepares CEQA documents as part of the CEQA coordination program.	1. Participates in the development, implementation, and completion of capital improvement projects related to new trails, parking lots, buildings, facilities, and/or District infrastructure. 2. Participates in the development of site plans and conceptual designs; addresses project design requirements and issues as they arise; develops options and solutions to resolve design, fiscal, schedule, legal, and/or construction issues; conducts outreach as appropriate to stakeholders affected by District projects. 3. Participates in the development of consultant requests for proposals for professional services and the advertising and bid processes; evaluates proposals and recommends project award; coordinates with legal counsel to determine District needs and requirements for contractual services; negotiates contracts and agreements and administers same after award. 4. Negotiates, administers, and manages contracts for services; reviews documents, reports, and other work products prepared by consultants and provides feedback and corrections; reviews and oversees consultant invoices and progress payments. 5. Provides quality control on work products including but not limited to reviewing technical reports, construction drawings, letters, permits, and memorandum produced by consultants. 6. Produces cost estimates, completion schedules, and project implementation budgets; monitors project expense budgets and approves/processes project expenditures; prepares reports and presentations for management and the Board of Directors. 7. Oversees the scheduling of assigned construction projects to ensure contractual compliance with plans,	• CM1 and PL1: Planning participates in this duty at earlier phase of work through conceptual and schematic design before it's handed off to capital project manager. • CM2 and PL1, PL7: Planning participates in the development of conceptual and schematic design, resolves project issues during feasibility and environmental review phases, and leads the majority of public engagement efforts related to projects that occur in the early phase of project delivery. • CM3 and PL3: Planning performs this function, structuring the RFQP to account for E&C-led future phases of work, so that E&C has a more streamlined opportunity to utilize the same consultant from the conceptual and schematic design phase for the final design phase. • CM4 and PL3, PL4: Planning performs this function. • CM5 and PL4, PL5, PL6: Planning performs quality control and peer review on work products such as technical reports, conceptual and schematic design plans, and other planning phase-specific deliverables. • CM6 and PL2, PL7, PL8, PL11: Cost estimates, project schedules, budgets, expenditures, reports and presentations are also part of the phases of projects that Planning leads. • CM8 and PL1: Planning secures land use permits, e.g. coastal development, conditional use, grading, resource management. • CM13 and PL14: Planning performs this function related to planning phase-specific topics. • CM14 and PL13, PL14: Planning performs this function related to planning phase-specific topics and deliverables.

Attachment 2

This table compares the job functions performed by the Midpen Planner I-II and Capital Project Manager I-II using the latest draft job descriptions provided. The comparison demonstrates that each department has unique expertise and focus relevant to their specific role and phase in the project delivery process **but overlap in significant job functions related to project management and delivery**. Planning leads public access projects in scoping, programming, planning, public engagement, early design (conceptual and schematic level) and environmental review after which projects transition to Engineering & Construction who leads final design, permitting, bidding, and construction.

(A) Midpen: Planner I-II *06/11/25 HR-provided draft job description*	**(B) Midpen: Capital Project Manager I-II** *06/11/25 HR-provided draft job description*	**(C) Analysis of CPM I-II Duties and Overlap with Planner I-II**
Planner I-II job duties are identified by PL and corresponding number (e.g. PL1) in Analysis of CPM I-II Duties column	CPM I-II job duties are identified by CM and corresponding number (e.g. CM1) in Analysis of CPM I-II Duties column	Numbers in parenthesis refer to the planning duty that aligns with the CPM duty (e.g., PL1)
6. Participates in the research, analysis, and peer review of new facility designs, maintenance, and improvements to remove barriers in support of the Americans with Disabilities Act (ADA) program. 7. Develops public engagement strategies for inclusive engagement on a project-by-project basis; plans and facilitates in-person and virtual public engagement events for projects; manages meeting logistics, develops content, and delivers presentations including addressing questions before, during, and after engagement events; provides support to other departments with public engagement strategies, tools, and implementation. 8. Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings. 9. Monitors and conducts external project reviews to identify potential issues or development proposals of private or public lands near or adjacent to open space preserves that may impact District interests and goals; assists in preparing recommendations to permitting agencies or landowners to minimize impacts on District lands or interests; prepares comment letters for review, as appropriate. 10. Supports the District's signage and/or historic resource programs; coordinates with other departments and external agencies in program initiatives; oversees outreach activities and facilitates updates and retention of program documentation, policies, and procedures. 11. Participates in the three-year Action Plan and Budget Plan development, including project scopes, schedules, budgets, and resource loading of staff time required to deliver planning and capital projects.	specifications, materials, schedules, workmanship, and safety standards. 8. Prepares materials for permit applications; applies for and obtains permits from other governmental agencies for District projects. 9. Inspects work during each construction phase to ensure that workmanship conforms to specifications, plans, District standards/constraints, and the adherence to construction schedules. 10. Maintains standard construction documents in conformance with changes in legal requirements and practices; advises consultants and staff in the preparation of technical specifications and construction details as it pertains to codes and constructability. 11. Conducts final inspections to assure the project's completion and that final acceptance includes necessary warranties and resolution of liquidated damages. 12. Provides appropriate operational staff with documents, warranties and, as necessary, an orientation of specialized functional components and systems. 13. Attends and participates in professional group meetings; stays abreast of contemporary trends and innovations in open space, preserve, and related services; researches emerging products and enhancements and their applicability to District needs. 14. Monitors changes in regulations and technology that may affect operations; implements policy and procedural changes after approval. 15. Receives, investigates, and responds to problems and complaints in a professional manner; identifies and reports findings and takes necessary corrective action. 16. Observes and complies with all District and mandated safety rules, regulations, and protocols.	• CM15 and PL Abilities: Planning performs this function, as listed in Planning Abilities section of the Planner II job description: "identify and respond to issues and concerns of the public, other District staff, and other boards and commissions." • CM16 and PL15: Planning performs this duty in its entirety.

Attachment 2

This table compares the job functions performed by the Midpen Planner I-II and Capital Project Manager I-II using the latest draft job descriptions provided. The comparison demonstrates that each department has unique expertise and focus relevant to their specific role and phase in the project delivery process **but overlap in significant job functions related to project management and delivery**. Planning leads public access projects in scoping, programming, planning, public engagement, early design (conceptual and schematic level) and environmental review after which projects transition to Engineering & Construction who leads final design, permitting, bidding, and construction.

(A) Midpen: Planner I-II *06/11/25 HR-provided draft job description*	**(B) Midpen: Capital Project Manager I-II** *06/11/25 HR-provided draft job description*	**(C) Analysis of CPM I-II Duties and Overlap with Planner I-II**
Planner I-II job duties are identified by PL and corresponding number (e.g. PL1) in Analysis of CPM I-II Duties column	CPM I-II job duties are identified by CM and corresponding number (e.g. CM1) in Analysis of CPM I-II Duties column	Numbers in parenthesis refer to the planning duty that aligns with the CPM duty (e.g., PL1)
12. Participates in the preparation and development of grant applications; assists Grants Program staff with administering grants, monitoring budgets, and submitting reimbursement requests and audit material; addresses project inquiries from granting agencies; prepares necessary grant-supporting reports. 13. Researches, analyzes, and interprets environmental and land use data and trends; prepares written reports on various advance planning matters and elements of other agency general and land use plans. 14. Attends meetings, conferences, workshops, and training sessions; attends and participates in professional group meetings; stays abreast of contemporary trends and innovations in the field of planning and other types of public services as they relate to the area of assignment. 15. Observes and complies with all District and mandated safety rules, regulations, and protocols. 16. Performs other duties as assigned.	17. Performs other duties as assigned.	

Attachment 3

Table 3.1: Midpen Planner II vs San Mateo County Planner II (comparable for Midpen Planner II) **and Capital Projects Manager I** (comparable for Midpen CPM II)
The highlighted duties in this table demonstrate that the Midpen Planner II performs most of the job duties of both comparator agency positions. ***Although the majority of both comparables' duties match, only the County's Planner II was used as a match for Midpen Planner II, leaving out key job functions.***

(A) Midpen: Planner II (PL) *06/11/25 HR-provided draft job description*	**(B) San Mateo County: Planner II** *2024-25 Compensation Study benchmarked comparator to Midpen Planner II, expecting a 8.10% increase 10/2025*	**(C) San Mateo County: Capital Projects Manager I** *2024-25 Compensation Study benchmarked comparator to Midpen CPM II, expecting a 5% salary increase 10/2025*
1. Participates in the scoping, planning, programming, conceptual and schematic design development, land use permitting, and environmental review of capital improvement projects related to public access, new trails and trailheads, parking lots, buildings, facilities, and other District infrastructure. 2. Manages assigned projects, developing, tracking, and reporting project scopes, schedules, and budgets; participates in the preparation of project implementation budgets, monitors and approves project expenditures, and processes project invoices. 3. Participates in the development of consultant requests for proposals for professional services and the advertising and bid processes; evaluates proposals and recommends project award; coordinates with legal counsel to determine District needs and requirements for contractual services; negotiates contracts and agreements and administers same after award. 4. Reviews documents, reports, and work products prepared by consultants and provides feedback and revisions of work products including feasibility studies, basis of design, concept and schematic design plans, detailed design drawings, environmental review documents, historical resource evaluations, transportation demand management studies, and other technical studies; facilitates review across multidepartment project team. 5. Conducts and/or assists with the California Environmental Quality Act (CEQA) analysis of capital improvements, facilities, maintenance activities, land purchases, and proposed new public uses of District lands; reviews and prepares CEQA documents as part of the CEQA coordination program. 6. Participates in the research, analysis, and peer review of new facility designs, maintenance, and improvements to remove barriers in support of the Americans with Disabilities Act (ADA) program. 7. Develops public engagement strategies for inclusive engagement on a project-by-project basis; plans and facilitates in-person and virtual public engagement events for projects;	1. Gather, compile, and analyze statistical data; study trends in land use, demographics and environmental impacts. *(PL-13)* 2. Conduct studies, compile data and information and prepare reports on land use, population, environmental impacts, transportation, ordinance amendments and other planning subjects. *(PL-4)* 3. Make field surveys and investigate related planning and zoning projects and inquiries. 4. Maintain automated historical records. 5. Prepare reports on data collected to support recommendations on zoning, transportation, and other land use projects. *(PL-13)* 6. Prepare recommendations and assist in presentations to the Planning Commission, Board of Supervisors, and public agencies. *(PL-8)* 7. Prepare or assist in revising maps, charts, graphs and other visual aids including departmental brochures and publications on land use and policies. *(PL-Qualifications)* 8. Act as liaison and consultant with the public, other agencies, department and/or sections of the Planning and Building Division. *(PL-10, PL-Qualifications)* 9. Attend public hearings, task forces, and other land use related meetings. *(PL-7, PL-8)* 10. May act as lead in the absence of the supervisor and on large projects. May act as supervisor in his/her absence. *(PL-2, PL-4)* 11. Perform related duties as assigned. *(PL-16)*	1. Manage major and/or complex capital projects from program planning through final acceptance of construction and warranty period. *(PL-1, PL-2)* 2. Oversee major maintenance and construction projects, which may include infrastructure, underground, structural, system upgrades, retrofits, replacement of building equipment and components. 3. Conduct needs assessments, cost analyses and feasibility studies to determine project requirements, space needs, options and cost estimates. *(PL-1, PL-4)* 4. Manage the consultant, contractor and vendor selection process, including the solicitation and evaluation of bids, coordinating requests for proposals and obtaining Board of Supervisors approvals. *(PL-3)* 5. Provide guidance and coordination of work to consultants and contractors related to project criteria, regulations, codes, standards and schedules. *(PL-2, PL-4, PL-Qualifications)* 6. Communicate orally and in writing with county officials, other county departments consultants, contractors, architects, engineers, outside agencies and the public on assigned projects. *(PL-7, PL-8,PL-9)* 7. Research and plan the various mechanisms used to finance projects such as state and federal grants, county funding, lease purchase agreements, certificates of participation, and joint powers agreements. *(PL-12)* 8. Keep projects within approved budget, and on their approved schedule; analyze claims, project costs, verify expenses, obtain fiscal approval when required and approve contractor/ consultant payment requests. *(PL-2, PL-3)* 9. Prepare, review and manage contracts, construction documents and technical reports for the development of new county facilities and the alteration of existing facilities or major maintenance projects; and requests for proposals and selection of various consultants and participate in their selection. *(PL-1, PL-2, PL-3, PL-4)*

Attachment 3

Table 3.1: Midpen Planner II vs San Mateo County Planner II (comparable for Midpen Planner II) **and Capital Projects Manager I** (comparable for Midpen CPM II)
The highlighted duties in this table demonstrate that the Midpen Planner II performs most of the job duties of both comparator agency positions. ***Although the majority of both comparables' duties match, only the County's Planner II was used as a match for Midpen Planner II, leaving out key job functions.***

(A) Midpen: Planner II (PL) *06/11/25 HR-provided draft job description*	**(B) San Mateo County: Planner II** *2024-25 Compensation Study benchmarked comparator to Midpen Planner II, expecting a 8.10% increase 10/2025*	**(C) San Mateo County: Capital Projects Manager I** *2024-25 Compensation Study benchmarked comparator to Midpen CPM II, expecting a 5% salary increase 10/2025*
manages meeting logistics, develops content, and delivers presentations including addressing questions before, during, and after engagement events; provides support to other departments with public engagement strategies, tools, and implementation. 8. Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings. 9. Monitors and conducts external project reviews to identify potential issues or development proposals of private or public lands near or adjacent to open space preserves that may impact District interests and goals; assists in preparing recommendations to permitting agencies or landowners to minimize impacts on District lands or interests; prepares comment letters for review, as appropriate. 10. Supports the District's signage and/or historic resource programs; coordinates with other departments and external agencies in program initiatives; oversees outreach activities and facilitates updates and retention of program documentation, policies, and procedures. 11. Participates in the three-year Action Plan and Budget Plan development, including project scopes, schedules, budgets, and resource loading of staff time required to deliver planning and capital projects. 12. Participates in the preparation and development of grant applications; assists Grants Program staff with administering grants, monitoring budgets, and submitting reimbursement requests and audit material; addresses project inquiries from granting agencies; prepares necessary grant-supporting reports. 13. Researches, analyzes, and interprets environmental and land use data and trends; prepares written reports on various advance planning matters and elements of other agency general and land use plans.		10. Assure that the pre-architectural work and conceptual designs meet the County's needs and are compatible with master plans. *(PL-1, PL-2, PL-4, PL-5, PL-6)* 11. Evaluate existing facilities and conduct on-site visits to identify repair or renovation projects and/or observe and approve work. 12. Prepare correspondence, communication and reports for the Board of Supervisors. *(PL-7, PL-8)* 13. Administer construction contracts, including inspection work, contract revisions, submittals, payments, schedules, budgets and project closeouts. 14. Act as coordinating liaison with county officials, consultants, contractors, architects, engineers, outside agencies and the public regarding capital improvement projects. *(PL-2, PL-7, PL-8)* 15. Maintain all project documents, recommend acceptance of assigned projects as being complete and perform project closeout. 16. Manage permit applications, resolve claims and disputes, and file notices. 17. Serve as a point of contact for county departments and act as liaison on projects; provide input and recommendations regarding technical and financial aspects, and coordination of various construction activities. *(PL-7, PL-Qualifications)* *18.* Work with consultants, architects, engineers, end users, building inspectors, maintenance and operations staff, contractors and vendors during the course of projects. *(PL-1, PL-2, PL-3, PL-4, PL-5)* 19. Perform related duties as assigned. *(PL-16)*

Attachment 3

Table 3.1: Midpen Planner II vs San Mateo County Planner II (comparable for Midpen Planner II) **and Capital Projects Manager I** (comparable for Midpen CPM II)
The highlighted duties in this table demonstrate that the Midpen Planner II performs most of the job duties of both comparator agency positions. ***Although the majority of both comparables' duties match, only the County's Planner II was used as a match for Midpen Planner II, leaving out key job functions.***

(A) Midpen: Planner II (PL) *06/11/25 HR-provided draft job description*	**(B) San Mateo County: Planner II** *2024-25 Compensation Study benchmarked comparator to Midpen Planner II, expecting a 8.10% increase 10/2025*	**(C) San Mateo County: Capital Projects Manager I** *2024-25 Compensation Study benchmarked comparator to Midpen CPM II, expecting a 5% salary increase 10/2025*
14. Attends meetings, conferences, workshops, and training sessions; attends and participates in professional group meetings; stays abreast of contemporary trends and innovations in the field of planning and other types of public services as they relate to the area of assignment. 15. Observes and complies with all District and mandated safety rules, regulations, and protocols. 16. Performs other duties as assigned.		

Table 3.2: Midpen Planner II vs San Mateo County Planner II (comparable for Midpen Planner II)

The highlighted duties in this table are not performed by the benchmarked comparable position and demonstrate that the comparable position does not perform 70% of the duties of the listed in the Midpen Planner II job description***. Using only this match leaves out key job junctions performed by the Midpen Planner II.***

(A) Midpen: Planner II *06/11/25 HR-provided draft job description*	**(B) San Mateo County: Planner II** *2024-25 Compensation Study benchmarked comparator to Midpen Planner II, expecting a 8.10% increase 10/2025*
1. Participates in the scoping, planning, programming, conceptual and schematic design development, land use permitting, and environmental review of capital improvement projects related to public access, new trails and trailheads, parking lots, buildings, facilities, and other District infrastructure. 2. Manages assigned projects, developing, tracking, and reporting project scopes, schedules, and budgets; participates in the preparation of project implementation budgets, monitors and approves project expenditures, and processes project invoices. 3. Participates in the development of consultant requests for proposals for professional services and the advertising and bid processes; evaluates proposals and recommends project award; coordinates with legal counsel to determine District needs and requirements for contractual services; negotiates contracts and agreements and administers same after award. 4. Reviews documents, reports, and work products prepared by consultants and provides feedback and revisions of work products including feasibility studies, basis of design, concept and schematic design plans, detailed design drawings, environmental review documents, historical resource evaluations, transportation demand management studies, and other technical studies; facilitates review across multidepartment project team. 5. Conducts and/or assists with the California Environmental Quality Act (CEQA) analysis of capital improvements, facilities, maintenance activities, land purchases, and proposed new public uses of District lands; reviews and prepares CEQA documents as part of the CEQA coordination program. 6. Participates in the research, analysis, and peer review of new facility designs, maintenance, and improvements to remove barriers in support of the Americans with Disabilities Act (ADA) program. 7. Develops public engagement strategies for inclusive engagement on a project-by-project basis; plans and facilitates in-person and virtual public engagement events for projects; manages meeting logistics, develops content, and delivers presentations including addressing questions before, during, and after engagement events; provides support to other departments with public engagement strategies, tools, and implementation. 8. Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings. 9. Monitors and conducts external project reviews to identify potential issues or development proposals of private or public lands near or adjacent to open space preserves that may impact District interests and goals; assists in preparing recommendations to permitting agencies or landowners to minimize impacts on District lands or interests; prepares comment letters for review, as appropriate.	1. Gather, compile, and analyze statistical data; study trends in land use, demographics and environmental impacts 2. Conduct studies, compile data and information and prepare reports on land use, population, environmental impacts, transportation, ordinance amendments and other planning subjects. 3. Make field surveys and investigate related planning and zoning projects and inquiries. 4. Maintain automated historical records. 5. Prepare reports on data collected to support recommendations on zoning, transportation, and other land use projects. 6. Prepare recommendations and assist in presentations to the Planning Commission, Board of Supervisors, and public agencies. 7. Prepare or assist in revising maps, charts, graphs and other visual aids including departmental brochures and publications on land use and policies. 8. Act as liaison and consultant with the public, other agencies, department and/or sections of the Planning and Building Division. 9. Attend public hearings, task forces, and other land use related meetings. 10. May act as lead in the absence of the supervisor and on large projects. May act as supervisor in his/her absence. 11. Perform related duties as assigned.

Table 3.2: Midpen Planner II vs San Mateo County Planner II (comparable for Midpen Planner II)

The highlighted duties in this table are not performed by the benchmarked comparable position and demonstrate that the comparable position does not perform 70% of the duties of the listed in the Midpen Planner II job description***. Using only this match leaves out key job junctions performed by the Midpen Planner II.***

(A) Midpen: Planner II *06/11/25 HR-provided draft job description*	**(B) San Mateo County: Planner II** *2024-25 Compensation Study benchmarked comparator to Midpen Planner II, expecting a 8.10% increase 10/2025*
10. Supports the District's signage and/or historic resource programs; coordinates with other departments and external agencies in program initiatives; oversees outreach activities and facilitates updates and retention of program documentation, policies, and procedures. 11. Participates in the three-year Action Plan and Budget Plan development, including project scopes, schedules, budgets, and resource loading of staff time required to deliver planning and capital projects. 12. Participates in the preparation and development of grant applications; assists Grants Program staff with administering grants, monitoring budgets, and submitting reimbursement requests and audit material; addresses project inquiries from granting agencies; prepares necessary grant-supporting reports. 13. Researches, analyzes, and interprets environmental and land use data and trends; prepares written reports on various advance planning matters and elements of other agency general and land use plans. 14. Attends meetings, conferences, workshops, and training sessions; attends and participates in professional group meetings; stays abreast of contemporary trends and innovations in the field of planning and other types of public services as they relate to the area of assignment. 15. Observes and complies with all District and mandated safety rules, regulations, and protocols. 16. Performs other duties as assigned.	

Attachment 4

Table 4.1: Midpen Planner II vs **Santa Clara County Associate Planner** (comparable for Midpen Planner II) **and Capital Project Manager I** (comparable for Midpen CPM II)
The highlighted duties in this table demonstrate that the Midpen Planner II performs most of the job duties of both comparator agency positions. ***Although the majority of both comparables' duties match, only the County's Associate Planner was used as a match for Midpen Planner II, leaving out key job functions.***

(A) Midpen: Planner II (PL) *06/11/25 HR-provided draft job description*	**(B) Santa Clara County: Associate Planner** *2024-25 Compensation Study benchmarked comparator to Midpen Planner II, expecting a 4% increase 07/2025*	**(C) Santa Clara County: Capital Project Manager I (CPM)** *2024-25 Compensation Study benchmarked comparator to Midpen CPM II, expecting a 4% increase 07/2025*
1. Leads the scoping, planning, programming, conceptual and schematic design development, land use permitting, and environmental review of capital improvement projects related to public access, new trails and trailheads, parking lots, buildings, facilities, and other District infrastructure. 2. Manages assigned projects, developing, tracking, and reporting project scopes, schedules, and budgets; participates in the preparation of project implementation budgets, monitors and approves project expenditures, and processes project invoices. 3. Leads the development of consultant requests for proposals for professional services and the advertising and bid processes; evaluates proposals and recommends project award; coordinates with legal counsel to determine District needs and requirements for contractual services; negotiates contracts and agreements and administers same after award. 4. Reviews documents, reports, and work products prepared by consultants and provides feedback and revisions of work products including feasibility studies, basis of design, concept and schematic design plans, environmental review documents, historical resource evaluations, transportation demand management studies, and other technical studies; facilitates review across multidepartment project team. 5. Conducts and/or assists with the California Environmental Quality Act (CEQA) analysis of capital improvements, facilities, maintenance activities, land purchases, and proposed new public uses of District lands; reviews and prepares CEQA documents as part of the CEQA coordination program. 6. Participates in the research, analysis, and peer review of new facility designs, maintenance, and improvements to remove barriers in support of the Americans with Disabilities Act (ADA) program. 7. Develops public engagement strategies for inclusive engagement on a project-by-project basis; plans and facilitates in-person and virtual public engagement events for projects; manages meeting logistics, develops content, and delivers	1. Participates in the development and management of planning studies, feasibility studies, master plans and concept plans, coordinates the work on minor projects, and reports on topics, such as land use, housing, historic resources, environmental impacts and economic development, in support of new or updated plan policies, regulations or programs; (*PL-4*) 2. Analyzes and reviews land development applications, site plans and building permit applications for completeness and conformance with policies, ordinances, master plans, concept plans, County General Plan, conditions of approval, and State and Federal regulations, prepares conditions of approval where necessary, and takes discretionary action on certain land development projects that are reviewed at the staff level, making required findings; 3. Abstracts information from aerial photographs, subdivision maps, census reports, building permits, etc., for analysis in planning studies; (*PL-Qualifications*) 4. Analyzes geographic information systems data and creates maps; (*PL-Qualifications*) 5. Prepares maps, plans, graphs, and other visual aids; (*PL-Qualifications)* 6. Performs field inspections to gather data relevant to planning projects and the development review process and/or to verify that development projects comply with approved plans or to initiate actions necessary to correct violations of regulations or project conditions; (*PL-Qualifications*) 7. Prepares recommendations and presents detailed reports on development applications, master plans, concept plans, feasibility studies and other planning-related documents to decision-making bodies such as Board of Supervisors, Parks and Recreation Commission, Planning Commission, Airport Land Use Commission, Historical Heritage Commission, Housing, Land Use, Environment and Transportation Committee, and San Martin Planning Advisory Committee; *(PL-1, PL-4, PL-8, PL-Qualifications)*	1. Develops project scope, budget, funding, and schedule; *(PL-1, PL-2)* 2. Manages consultant and contractor selection process and participates as a member of consultant selection committee and is responsible for fee negotiations and approval of contracts; *(PL-3)* 3. Communicates among the County, consultants, and other interested agencies or parties; *(PL-4, PL-5, PL-7, PL-8, PL-9)* 4. Assures that project program and conceptual design meet the County's needs and are compatible with master plans; *(PL-1, PL-2, PL-4, PL-5, PL-6)* 5. Responsible for keeping projects within approved budgets on their approved schedule; Analyzes claims and approves consultant/contractor payment requests; *(PL-2)* 6. Participates in public hearings; Prepares and presents project reports; *(PL-8)* 7. Provides guidance to consultant on project criteria, regulations, codes, standards and schedules; *(PL-2, PL-4, PL-Qualifications)* 8. Identifies and manages responses to CEQA, ADA, energy conservation, and other special requirements; *(PL-5, PL-6)* 9. Evaluates existing facilities; *(PL-1)* 10. Reviews and approves technical reports, designs, and contract documents to assure adequacy, compliance with project program and constructability and cost efficiency; Coordinates the review of such documents by other County staff and/or consultant peer reviewers; *(PL-4, PL-5, PL-Qualifications)* 11. Secures the approval of designs and construction documents by the appropriate governmental agencies; *(PL-1, PL-8)* 12. May produce technical reports, studies, architectural/engineering contract documents and technical specifications; *(PL-4, PL-14)* 13. Inspects progress and approves the completion of construction projects; 14. May assign and approve the work of construction inspectors;

Attachment 4

Table 4.1: Midpen Planner II vs **Santa Clara County Associate Planner** (comparable for Midpen Planner II) **and Capital Project Manager I** (comparable for Midpen CPM II)
The highlighted duties in this table demonstrate that the Midpen Planner II performs most of the job duties of both comparator agency positions. ***Although the majority of both comparables' duties match, only the County's Associate Planner was used as a match for Midpen Planner II, leaving out key job functions.***

(A) Midpen: Planner II (PL) *06/11/25 HR-provided draft job description*	**(B) Santa Clara County: Associate Planner** *2024-25 Compensation Study benchmarked comparator to Midpen Planner II, expecting a 4% increase 07/2025*	**(C) Santa Clara County: Capital Project Manager I (CPM)** *2024-25 Compensation Study benchmarked comparator to Midpen CPM II, expecting a 4% increase 07/2025*
presentations including addressing questions before, during, and after engagement events; provides support to other departments with public engagement strategies, tools, and implementation. 8. Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings. 9. Monitors and conducts external project reviews to identify potential issues or development proposals of private or public lands near or adjacent to open space preserves that may impact District interests and goals; assists in preparing recommendations to permitting agencies or landowners to minimize impacts on District lands or interests; prepares comment letters for review, as appropriate. 10. Manages the District's signage program; leads District sign committee meetings; prepares or modifies new field signs; prepares new signage artwork; conducts field research; improves and maintains District sign manual and sign inventory; researches appropriate sign locations; coordinates with field staff regarding installation; places orders for new signage with vendors. 11. Leads the District's historic resource program; managing contract administration; directing consultants in preparation of Historic Resource Evaluations, conducting research; monitoring other District department workplans to ensure Historic Resource Evaluations conducted in accordance with policies and procedures; managing historic resource documentation including GIS application and historic resource library. 12. Participates in the three-year Action Plan and Budget Plan development, including project scopes, schedules, budgets, and resource loading of staff time required to deliver planning and capital projects. 13. Assists Grants Program staff with the preparation and development of grant applications, monitoring budgets, and	8. Enters development permit information and permit process workflow data in a central database; 9. Tracks application and project expenses and verifies the accuracy of invoices; *(PL-2)* 10. Coordinates staff, agency and community review of development applications, zoning and plan amendments; 11. Answers inquiries and provides general information to the public regarding land use projects, permitting procedures, development policies, plans, zoning ordinances and other regulations; (*PL-Qualifications*) 12. Provides information to the public regarding the permitting and development review requirements of other County departments such as Fire Marshal's Office, Environmental Health, Land Development Engineering, Geology, Roads and Airports, and Building, and County programs such as Williamson Act, Historic Preservation, and the Santa Clara Valley Habitat Plan; 13. Provides customer support for the preparation and processing of routine to moderately difficult development applications, re-zonings, and plan amendments; 14. Writes and delivers presentations; *(PL8, PL-Qualifications)* 15. Participates in meetings, conferences, and workshops; *(PL-15)* 16. Prepares environmental documents in compliance with the California Environmental Quality Act (CEQA) such as Categorical Exemptions, Negative Declarations or Addendum to Environmental Impact Reports; *(PL-5)* 17. Conducts in-depth property specific research including the review of deeds and other legal documents; 18. Conducts outreach to community groups, government agencies, developers and the public to encourage participation, resolve problems or obtain input; *(PL-7)* 19. Resolves issues and complaints from the public or neighbors and permit applicants; *(PL-Qualifications)* 20. Attends evening meetings; (*PL-7, PL-8*) 21. May be assigned as a Disaster Service Worker, as required; *(District policies)*	15. May be assigned as a Disaster Service Worker, as required; *(District policies)* 16. Performs other related duties as required. (*PL-17)*

Attachment 4

Table 4.1: Midpen Planner II vs **Santa Clara County Associate Planner** (comparable for Midpen Planner II) **and Capital Project Manager I** (comparable for Midpen CPM II)
The highlighted duties in this table demonstrate that the Midpen Planner II performs most of the job duties of both comparator agency positions. ***Although the majority of both comparables' duties match, only the County's Associate Planner was used as a match for Midpen Planner II, leaving out key job functions.***

(A) Midpen: Planner II (PL) *06/11/25 HR-provided draft job description*	**(B) Santa Clara County: Associate Planner** *2024-25 Compensation Study benchmarked comparator to Midpen Planner II, expecting a 4% increase 07/2025*	**(C) Santa Clara County: Capital Project Manager I (CPM)** *2024-25 Compensation Study benchmarked comparator to Midpen CPM II, expecting a 4% increase 07/2025*
submitting reimbursement requests and audit material; addresses project inquiries from granting agencies; prepares necessary grant-supporting reports. 14. Researches, analyzes, and interprets environmental and land use data and trends; prepares written reports on various advance planning matters and elements of other agency general and land use plans. 15. Attends meetings, conferences, workshops, and training sessions; attends and participates in professional group meetings; stays abreast of contemporary trends and innovations in the field of planning and other types of public services as they relate to the area of assignment. 16. Observes and complies with all District and mandated safety rules, regulations, and protocols. 17. Performs other duties as assigned.	22. Performs related duties as required. *(P-17)*	

Table 4.2: Midpen Planner II vs Santa Clara County Associate Planner (comparable for Midpen Planner II)

The highlighted duties in this table are not performed by the benchmarked comparable position and demonstrate that the comparable position does not perform 70% of the duties of the listed in the Midpen Planner II job description***. Using only this match leaves out key job junctions performed by the Midpen Planner II.***

(A) Midpen: Planner II *06/11/25 HR-provided draft job description*	**(B) Santa Clara County: Associate Planner** *2024-25 Compensation Study benchmarked comparator to Midpen Planner II*
1. Leads the scoping, planning, programming, conceptual and schematic design development, land use permitting, and environmental review of capital improvement projects related to public access, new trails and trailheads, parking lots, buildings, facilities, and other District infrastructure. 2. Manages assigned projects, developing, tracking, and reporting project scopes, schedules, and budgets; participates in the preparation of project implementation budgets, monitors and approves project expenditures, and processes project invoices. 3. Leads the development of consultant requests for proposals for professional services and the advertising and bid processes; evaluates proposals and recommends project award; coordinates with legal counsel to determine District needs and requirements for contractual services; negotiates contracts and agreements and administers same after award. 4. Reviews documents, reports, and work products prepared by consultants and provides feedback and revisions of work products including feasibility studies, basis of design, concept and schematic design plans, environmental review documents, historical resource evaluations, transportation demand management studies, and other technical studies; facilitates review across multidepartment project team. 5. Conducts and/or assists with the California Environmental Quality Act (CEQA) analysis of capital improvements, facilities, maintenance activities, land purchases, and proposed new public uses of District lands; reviews and prepares CEQA documents as part of the CEQA coordination program. 6. Participates in the research, analysis, and peer review of new facility designs, maintenance, and improvements to remove barriers in support of the Americans with Disabilities Act (ADA) program. 7. Develops public engagement strategies for inclusive engagement on a project-by-project basis; plans and facilitates in-person and virtual public engagement events for projects; manages meeting logistics, develops content, and delivers presentations including addressing questions before, during, and after engagement events; provides support to other departments with public engagement strategies, tools, and implementation. 8. Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings. 9. Monitors and conducts external project reviews to identify potential issues or development proposals of private or public lands near or adjacent to open space preserves that may impact District interests and goals; assists in preparing recommendations to permitting agencies or landowners to minimize impacts on District lands or interests; prepares comment letters for review, as appropriate. 10. Manages the District's signage program; leads District sign committee meetings; prepares or modifies new field signs; prepares new signage artwork; conducts field research; improves	1. Participates in the development and management of planning studies, feasibility studies, master plans and concept plans, coordinates the work on minor projects, and reports on topics, such as land use, housing, historic resources, environmental impacts and economic development, in support of new or updated plan policies, regulations or programs; 2. Analyzes and reviews land development applications, site plans and building permit applications for completeness and conformance with policies, ordinances, master plans, concept plans, County General Plan, conditions of approval, and State and Federal regulations, prepares conditions of approval where necessary, and takes discretionary action on certain land development projects that are reviewed at the staff level, making required findings; 3. Abstracts information from aerial photographs, subdivision maps, census reports, building permits, etc., for analysis in planning studies; 4. Analyzes geographic information systems data and creates maps; 5. Prepares maps, plans, graphs, and other visual aids; 6. Performs field inspections to gather data relevant to planning projects and the development review process and/or to verify that development projects comply with approved plans or to initiate actions necessary to correct violations of regulations or project conditions; 7. Prepares recommendations and presents detailed reports on development applications, master plans, concept plans, feasibility studies and other planning-related documents to decision-making bodies such as Board of Supervisors, Parks and Recreation Commission, Planning Commission, Airport Land Use Commission, Historical Heritage Commission, Housing, Land Use, Environment and Transportation Committee, and San Martin Planning Advisory Committee; 8. Enters development permit information and permit process workflow data in a central database; 9. Tracks application and project expenses and verifies the accuracy of invoices; 10. Coordinates staff, agency and community review of development applications, zoning and plan amendments; 11. Answers inquiries and provides general information to the public regarding land use projects, permitting procedures, development policies, plans, zoning ordinances and other regulations; 12. Provides information to the public regarding the permitting and development review requirements of other County departments such as Fire Marshal's Office, Environmental Health, Land Development Engineering, Geology, Roads and Airports, and Building, and County programs such as Williamson Act, Historic Preservation, and the Santa Clara Valley Habitat Plan; 13. Provides customer support for the preparation and processing of routine to moderately difficult development applications, re-zonings, and plan amendments; 14. Writes and delivers presentations;

Table 4.2: Midpen Planner II vs Santa Clara County Associate Planner (comparable for Midpen Planner II)

The highlighted duties in this table are not performed by the benchmarked comparable position and demonstrate that the comparable position does not perform 70% of the duties of the listed in the Midpen Planner II job description***. Using only this match leaves out key job junctions performed by the Midpen Planner II.***

(A) Midpen: Planner II *06/11/25 HR-provided draft job description*	**(B) Santa Clara County: Associate Planner** *2024-25 Compensation Study benchmarked comparator to Midpen Planner II*
and maintains District sign manual and sign inventory; researches appropriate sign locations; coordinates with field staff regarding installation; places orders for new signage with vendors. 11. Leads the District's historic resource program; managing contract administration; directing consultants in preparation of Historic Resource Evaluations, conducting research; monitoring other District department workplans to ensure Historic Resource Evaluations conducted in accordance with policies and procedures; managing historic resource documentation including GIS application and historic resource library. 12. Participates in the three-year Action Plan and Budget Plan development, including project scopes, schedules, budgets, and resource loading of staff time required to deliver planning and capital projects. 13. Assists Grants Program staff with the preparation and development of grant applications, monitoring budgets, and submitting reimbursement requests and audit material; addresses project inquiries from granting agencies; prepares necessary grant-supporting reports. 14. Researches, analyzes, and interprets environmental and land use data and trends; prepares written reports on various advance planning matters and elements of other agency general and land use plans. 15. Attends meetings, conferences, workshops, and training sessions; attends and participates in professional group meetings; stays abreast of contemporary trends and innovations in the field of planning and other types of public services as they relate to the area of assignment. 16. Observes and complies with all District and mandated safety rules, regulations, and protocols. 17. Performs other duties as assigned.	15. Participates in meetings, conferences, and workshops; 16. Prepares environmental documents in compliance with the California Environmental Quality Act (CEQA) such as Categorical Exemptions, Negative Declarations or Addendum to Environmental Impact Reports; 17. Conducts in-depth property specific research including the review of deeds and other legal documents; 18. Conducts outreach to community groups, government agencies, developers and the public to encourage participation, resolve problems or obtain input; 19. Resolves issues and complaints from the public or neighbors and permit applicants; 20. Attends evening meetings; 21. May be assigned as a Disaster Service Worker, as required; 22. Performs related duties as required.

Attachment 5

Table 5.1: Midpen Planner II vs City of San Jose Planner II (comparable for Midpen Planner II) **and Structure/Landscape Designer II** (comparable for Midpen CPM II)
The highlighted duties in this table demonstrate that the Midpen Planner II performs most of the job duties of the comparator agency positions. ***Although the majority of both comparables' duties match, only the City's Planner II was used as a match for Midpen Planner II, leaving out key job functions.***

(A) Midpen: Planner II (PL) *06/11/25 HR-provided draft job description*	**(B) San Jose: Planner II** *2024-25 Compensation Study benchmarked comparator to Midpen Planner II, expecting a 3.5-4% increase 07/2025*	**(C) San Jose: Structure/Landscape Designer II** *2024-25 Compensation Study benchmarked comparator to Midpen CPM II, expecting a 3.5-4% increase 07/2025*
1. Participates in the scoping, planning, programming, conceptual and schematic design development, land use permitting, and environmental review of capital improvement projects related to public access, new trails and trailheads, parking lots, buildings, facilities, and other District infrastructure. 2. Manages assigned projects, developing, tracking, and reporting project scopes, schedules, and budgets; participates in the preparation of project implementation budgets, monitors and approves project expenditures, and processes project invoices. 3. Participates in the development of consultant requests for proposals for professional services and the advertising and bid processes; evaluates proposals and recommends project award; coordinates with legal counsel to determine District needs and requirements for contractual services; negotiates contracts and agreements and administers same after award. 4. Reviews documents, reports, and work products prepared by consultants and provides feedback and revisions of work products including feasibility studies, basis of design, concept and schematic design plans, detailed design drawings, environmental review documents, historical resource evaluations, transportation demand management studies, and other technical studies; facilitates review across multidepartment project team. 5. Conducts and/or assists with the California Environmental Quality Act (CEQA) analysis of capital improvements, facilities, maintenance activities, land purchases, and proposed new public uses of District lands; reviews and prepares CEQA documents as part of the CEQA coordination program. 6. Participates in the research, analysis, and peer review of new facility designs, maintenance, and improvements to remove barriers in support of the Americans with Disabilities Act (ADA) program. 7. Develops public engagement strategies for inclusive engagement on a project-by-project basis; plans and facilitates in-person and virtual public engagement events for projects;	1. Oversees and coordinates land use entitlements including zonings, development permits, administrative permits and other procedures by analysis of projects for conformance with City Policy and Ordinance, meeting and conferring with applicants, preparation of written correspondence, reports and legal documents, oral presentations at community meetings and public hearings and coordination with representatives of other City Departments and outside agencies. *(PL-7, PL-8)* 2. Provides information and direction to professionals, developers and the general public concerning the General Plan, Planning related code interpretations such as but not limited to Zoning, Sign, CEQA, Historic Preservation, Planning development policies and guidelines, and status of land development projects . 3. Participates in the review of the General Plan, analyzing land use compatibility issues, economic implications and consistency with other City policies for possible changes to the City's General Plan initiated by staff, the City Council or private individuals. 4. Participates in the preparation of Specific Plans, special studies, land use policies and updates to the City's Planning development codes including the Zoning Ordinance and Sign Ordinance. 5. Conducts research, data management, analysis and reporting in support of other Planning activities. Typical areas addressed include population characteristics, land development patterns, and maintenance of GIS layers and relational databases. (*PL-13*) 6. Reviews and prepares environmental documents to meet the requirements of the California Environmental Quality Act (CEQA) or other governing environmental regulations. Includes the analysis of potential environmental impacts associated with a project, review of technical reports prepared by environmental consultants, research of regulatory and technical issues and other analytical work. (*PL-4, PL-5*)	1. Plans work and supervises sub-professional workers in field investigation and surveys in the course of routine project development. (*PL-1, PL-2, PL-4*) 2. Reviews, analyzes and computes field data. 3. Prepares designs, plans and specifications for conformance to established standards and directs the inspections of facilities under construction or repair. 4. Consults with public and private consultants, contractors, and owners relative to construction and maintenance of public works facilities as assigned. (*PL-3, PL-4*) 5. Prepares technical reports requiring research. 6. Coordinates project management by overseeing, controlling and guiding construction of project. 7. Prepares or reviews plans and specifications, prepares bidding documents, solicits bids, awards contracts, administers the contract, interprets plans and specifications, resolves field problems, gives final inspection and follows through with acceptance of project. (*PL-3, PL-4*) 8. Administers consultant agreements. (*PL-3*) 9. Issues and reviews legal documents such as construction agreements, bonds, insurances, and fees. (*PL-3*) 10. Designs building projects to comply with all applicable codes and regulations. 11. Develops schematic and preliminary building design concepts. 12. Prepares reports and Council memos for City projects. *(PL-8, PL-Qualifications*) 13. Participates in coordinating a full range of project management activities necessary to take a project from project definition through design, public bidding, construction and to completion of the project. (*PL-1, Pl-2, PL-3*) 14. Coordinates projects with other City departments, flood control districts, other public agencies and community groups and citizen organizations. (*PL-7*) 15. Provides analysis and cost estimates of construction.

Attachment 5

Table 5.1: Midpen Planner II vs City of San Jose Planner II (comparable for Midpen Planner II) **and Structure/Landscape Designer II** (comparable for Midpen CPM II)
The highlighted duties in this table demonstrate that the Midpen Planner II performs most of the job duties of the comparator agency positions. ***Although the majority of both comparables' duties match, only the City's Planner II was used as a match for Midpen Planner II, leaving out key job functions.***

(A) Midpen: Planner II (PL) *06/11/25 HR-provided draft job description*	**(B) San Jose: Planner II** *2024-25 Compensation Study benchmarked comparator to Midpen Planner II, expecting a 3.5-4% increase 07/2025*	**(C) San Jose: Structure/Landscape Designer II** *2024-25 Compensation Study benchmarked comparator to Midpen CPM II, expecting a 3.5-4% increase 07/2025*
manages meeting logistics, develops content, and delivers presentations including addressing questions before, during, and after engagement events; provides support to other departments with public engagement strategies, tools, and implementation. 8. Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings. 9. Monitors and conducts external project reviews to identify potential issues or development proposals of private or public lands near or adjacent to open space preserves that may impact District interests and goals; assists in preparing recommendations to permitting agencies or landowners to minimize impacts on District lands or interests; prepares comment letters for review, as appropriate. 10. Supports the District's signage and/or historic resource programs; coordinates with other departments and external agencies in program initiatives; oversees outreach activities and facilitates updates and retention of program documentation, policies, and procedures. 11. Participates in the three-year Action Plan and Budget Plan development, including project scopes, schedules, budgets, and resource loading of staff time required to deliver planning and capital projects. 12. Participates in the preparation and development of grant applications; assists Grants Program staff with administering grants, monitoring budgets, and submitting reimbursement requests and audit material; addresses project inquiries from granting agencies; prepares necessary grant-supporting reports. 13. Researches, analyzes, and interprets environmental and land use data and trends; prepares written reports on various advance planning matters and elements of other agency general and land use plans.	7. Prepares and delivers oral and written reports and recommendations on land use decisions at staff meetings, community meetings and public hearings. Prepares supporting visual presentation materials utilizing a variety of computerized and non-computerized presentation techniques. (*PL-7, PL-8*) 8. Performs record keeping activities including the creation and maintenance of computerized tracking databases such as the Application Management and Data Automation (AMANDA) system. *(District policies)* 9. Performs other duties of a similar nature or level. (*PL-16*)	16. Licensed Architects and Landscape Architects may be responsible for signing off and approving construction plans and drawings for professional landscape architecture work. 17. Performs other duties of a similar nature or level. (*PL-16*)

Attachment 5

Table 5.1: Midpen Planner II vs City of San Jose Planner II (comparable for Midpen Planner II) **and Structure/Landscape Designer II** (comparable for Midpen CPM II)
The highlighted duties in this table demonstrate that the Midpen Planner II performs most of the job duties of the comparator agency positions. ***Although the majority of both comparables' duties match, only the City's Planner II was used as a match for Midpen Planner II, leaving out key job functions.***

(A) Midpen: Planner II (PL) *06/11/25 HR-provided draft job description*	**(B) San Jose: Planner II** *2024-25 Compensation Study benchmarked comparator to Midpen Planner II, expecting a 3.5-4% increase 07/2025*	**(C) San Jose: Structure/Landscape Designer II** *2024-25 Compensation Study benchmarked comparator to Midpen CPM II, expecting a 3.5-4% increase 07/2025*
14. Attends meetings, conferences, workshops, and training sessions; attends and participates in professional group meetings; stays abreast of contemporary trends and innovations in the field of planning and other types of public services as they relate to the area of assignment. 15. Observes and complies with all District and mandated safety rules, regulations, and protocols. 16. Performs other duties as assigned.		

Table 5.2: Midpen Planner II vs City of San Jose Planner II (comparable for Midpen Planner II)

The highlighted duties in this table are not performed by the benchmarked comparable position and demonstrate that the comparable position does not perform 70% of the duties of the listed in the Midpen Planner II job description***. Using only this match leaves out key job junctions performed by the Midpen Planner II.***

(A) Midpen: Planner II *06/11/25 HR-approved draft job description*	**(B) San Jose: Planner II** *2024-25 Compensation Study benchmarked comparator to Midpen Planner II*
1. Participates in the scoping, planning, programming, conceptual and schematic design development, land use permitting, and environmental review of capital improvement projects related to public access, new trails and trailheads, parking lots, buildings, facilities, and other District infrastructure. 2. Manages assigned projects, developing, tracking, and reporting project scopes, schedules, and budgets; participates in the preparation of project implementation budgets, monitors and approves project expenditures, and processes project invoices. 3. Participates in the development of consultant requests for proposals for professional services and the advertising and bid processes; evaluates proposals and recommends project award; coordinates with legal counsel to determine District needs and requirements for contractual services; negotiates contracts and agreements and administers same after award. 4. Reviews documents, reports, and work products prepared by consultants and provides feedback and revisions of work products including feasibility studies, basis of design, concept and schematic design plans, detailed design drawings, environmental review documents, historical resource evaluations, transportation demand management studies, and other technical studies; facilitates review across multidepartment project team. 5. Conducts and/or assists with the California Environmental Quality Act (CEQA) analysis of capital improvements, facilities, maintenance activities, land purchases, and proposed new public uses of District lands; reviews and prepares CEQA documents as part of the CEQA coordination program. 6. Participates in the research, analysis, and peer review of new facility designs, maintenance, and improvements to remove barriers in support of the Americans with Disabilities Act (ADA) program. 7. Develops public engagement strategies for inclusive engagement on a project-by-project basis; plans and facilitates in-person and virtual public engagement events for projects; manages meeting logistics, develops content, and delivers presentations including addressing questions before, during, and after engagement events; provides support to other departments with public engagement strategies, tools, and implementation. 8. Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings. 9. Monitors and conducts external project reviews to identify potential issues or development proposals of private or public lands near or adjacent to open space preserves that may impact District interests and goals; assists in preparing recommendations to permitting agencies or landowners to minimize impacts on District lands or interests; prepares comment letters for review, as appropriate. 10. Supports the District's signage and/or historic resource programs; coordinates with other departments and external agencies in program initiatives; oversees outreach activities and facilitates updates and retention of program documentation, policies, and procedures.	1. Oversees and coordinates land use entitlements including zonings, development permits, administrative permits and other procedures by analysis of projects for conformance with City Policy and Ordinance, meeting and conferring with applicants, preparation of written correspondence, reports and legal documents, oral presentations at community meetings and public hearings and coordination with representatives of other City Departments and outside agencies. 2. Provides information and direction to professionals, developers and the general public concerning the General Plan, Planning related code interpretations such as but not limited to Zoning, Sign, CEQA, Historic Preservation, Planning development policies and guidelines, and status of land development projects. 3. Participates in the review of the General Plan, analyzing land use compatibility issues, economic implications and consistency with other City policies for possible changes to the City's General Plan initiated by staff, the City Council or private individuals. 4. Participates in the preparation of Specific Plans, special studies, land use policies and updates to the City's Planning development codes including the Zoning Ordinance and Sign Ordinance. 5. Conducts research, data management, analysis and reporting in support of other Planning activities. Typical areas addressed include population characteristics, land development patterns, and maintenance of GIS layers and relational databases. 6. Reviews and prepares environmental documents to meet the requirements of the California Environmental Quality Act (CEQA) or other governing environmental regulations. Includes the analysis of potential environmental impacts associated with a project, review of technical reports prepared by environmental consultants, research of regulatory and technical issues and other analytical work 7. Prepares and delivers oral and written reports and recommendations on land use decisions at staff meetings, community meetings and public hearings. Prepares supporting visual presentation materials utilizing a variety of computerized and non-computerized presentation techniques 8. Performs record keeping activities including the creation and maintenance of computerized tracking databases such as the Application Management and Data Automation (AMANDA) system. 9. Performs other duties of a similar nature or level.

Table 5.2: Midpen Planner II vs City of San Jose Planner II (comparable for Midpen Planner II)

The highlighted duties in this table are not performed by the benchmarked comparable position and demonstrate that the comparable position does not perform 70% of the duties of the listed in the Midpen Planner II job description***. Using only this match leaves out key job junctions performed by the Midpen Planner II.***

(A) Midpen: Planner II *06/11/25 HR-approved draft job description*	**(B) San Jose: Planner II** *2024-25 Compensation Study benchmarked comparator to Midpen Planner II*
11. Participates in the three-year Action Plan and Budget Plan development, including project scopes, schedules, budgets, and resource loading of staff time required to deliver planning and capital projects. 12. Participates in the preparation and development of grant applications; assists Grants Program staff with administering grants, monitoring budgets, and submitting reimbursement requests and audit material; addresses project inquiries from granting agencies; prepares necessary grant-supporting reports. 13. Researches, analyzes, and interprets environmental and land use data and trends; prepares written reports on various advance planning matters and elements of other agency general and land use plans. 14. Attends meetings, conferences, workshops, and training sessions; attends and participates in professional group meetings; stays abreast of contemporary trends and innovations in the field of planning and other types of public services as they relate to the area of assignment. 15. Observes and complies with all District and mandated safety rules, regulations, and protocols. 16. Performs other duties as assigned.	

County of San Mateo

Planner II

CLASS CODE	R050	**SALARY**	$46.20 - $57.75 Hourly $3,696.00 - $4,620.00 Biweekly $8,008.00 - $10,010.00 Monthly $96,096.00 - $120,120.00 Annually
REVISION DATE	January 09, 2001		

Definition

Under general supervision, research and analyze planning data, conduct planning studies, prepare environmental documents, and assist in land use and zoning administration for current and future community projects.

DISTINGUISHING CHARACTERISTICS

Planner I is the entry level in the Planner series. Under immediate supervision, incumbents learn how to apply their professional training to a work production environment and how to perform the simplest and least complex planning review activities. This class is flexibly staffed with Planner II and incumbents may advance to the higher level after gaining experience and demonstrating proficiency in the work.

Planner II is the full experienced journey level in the Planner series. Under general supervision, incumbents perform a full range of planner activities and exercise substantial independence and initiative in carrying out their assignments. This class is flexibly staffed with Planner III and incumbents may advance to the higher level after gaining experience and demonstrating proficiency in the work.

Planner III is the advanced journey level in the Planner Series. Under direction, incumbents carry out the major and more complex land use projects in all sections of the Division. Incumbents provide direction to other professional staff on projects and operate with independence within the parameters of legislative and divisional policy.

Examples Of Duties

Duties may include, but are not limited to, the following:

- Gather, compile, and analyze statistical data; study trends in land use, demographics and environmental impacts.
- Conduct studies, compile data and information and prepare reports on land use, population, environmental impacts, transportation, ordinance amendments and other planning subjects.

- Make field surveys and investigate related planning and zoning projects and inquiries.
- Maintain automated historical records.
- Prepare reports on data collected to support recommendations on zoning, transportation, and other land use projects.
- Prepare recommendations and assist in presentations to the Planning Commission, Board of Supervisors, and public agencies.
- Prepare or assist in revising maps, charts, graphs and other visual aids including departmental brochures and publications on land use and policies.
- Act as liaison and consultant with the public, other agencies, department and/or sections of the Planning and Building Division.
- Attend public hearings, task forces, and other land use related meetings.
- May act as lead in the absence of the supervisor and on large projects.
- May act as supervisor in his/her absence.
- Perform related duties as assigned.

Qualifications

Note: The level and scope of the knowledge, skills and abilities listed below are related to job duties as defined under Distinguishing Characteristics.

Knowledge of:

- The organization of local government and concepts of public administration.
- Principles, practices and trends in urban and regional planning, including physical, social and economic factors.
- Codes, ordinances and laws related to planning, zoning, environmental resource protection, and subdivisions.
- Basic computer operations.
- Basic lead and supervisory principals and practices.
- Research and statistical methods and sources of data.
- Mathematical principals, tools and practices used in determining density and structural floor area.
- Symbols, language and techniques used in planning, drafting, mapping and the basic principles involved in interpreting aerial photography.

Skill/Ability to:

- Work cooperatively and effectively with the public, co-workers and individually and as a member of a professional and technical team and individually.
- Recognize the key importance of customers, their unique situation and the department's and division's relationship with the customer in problem resolution and information giving situations.
- Produce comprehensive, clear and concise reports, memos, letters, staff reports and major studies which are accurately researched, focused on essential information, reflect an appropriate level of analysis, and demonstrate objectivity.
- Make concise and understandable presentations, manage related discussions, facilitate decision-making, formulate alternatives, and summarize and respond to comments effectively.
- Make valid conclusions and appropriate alternative recommendations.
- Explain policy and procedures to the public and staff.
- Facilitate problem resolution.

- Operate and retrieve information using a computer.
- Adapt to changing situations even under pressure.
- Conduct research including gathering, interpreting and presenting data; reach conclusions, develop defensible recommendations and formulate feasible policy and regulations.
- Interpret and explain maps, charts and tables; coordinate the preparation of a wide range of visual aids which clearly illustrate issues concepts, and programs.

Education and Experience:

Any combination of education and experience that would likely provide the required knowledge, skills and abilities is qualifying. A typical way to qualify is:

Planner I: Bachelor's degree in Planning or a closely related field.

Planner II: Two years of professional planning experience.

Planner III: Three years of professional planning experience.

County of San Mateo

Capital Projects Manager I

CLASS CODE N001

SALARY $53.70 - $67.13 Hourly

$4,296.00 - $5,370.40 Biweekly

$9,308.00 - $11,635.87 Monthly

$111,696.00 - $139,630.40 Annually

REVISION DATE August 19, 2019

Definition

Perform construction and capital improvement project management work involving the planning, design, bidding and construction of assigned capital facility construction and major building remodel, renovation, upgrade, and tenant improvement projects; integrate of all phases of work, from the initial planning stages, to the completion of construction and warranty period; manage simultaneous capital improvement and major maintenance projects with varying budgeted costs, completion deadlines and levels of political sensitivity and visibility.

DISTINGUISHING CHARACTERISTICS

Capital Projects Manager I is the first level of the Capital Projects Manager series. This classification is distinguished from Capital Project Manager II in that the latter is assigned to capital projects with a budget of up to $40 million. Incumbents exercise discretion and latitude of judgement within established policies and communicate project information orally and in writing with department heads, Board members, the County Manager, heads of other governmental agencies, with contractors, county staff and the public.

SUPERVISION RECEIVED AND EXERCISED

Depending on assignment, receive general direction from a Supervising Capital Project Manager or a higher-level manager. May also receive project direction from a Senior Capital Projects Manager. Exercise direct and indirect supervision over professional and technical staff, including consultants and contractors.

Examples Of Duties

Duties may include, but are not limited to, the following:

- Manage major and/or complex capital projects from program planning through final acceptance of construction and warranty period.
- Oversee major maintenance and construction projects, which may include infrastructure, underground, structural, system upgrades, retrofits, replacement of building equipment and components.
- Conduct needs assessments, cost analyses and feasibility studies to determine project requirements, space needs, options and cost estimates.

- Manage the consultant, contractor and vendor selection process, including the solicitation and evaluation of bids, coordinating requests for proposals and obtaining Board of Supervisors approvals.
- Provide guidance and coordination of work to consultants and contractors related to project criteria, regulations, codes, standards and schedules.
- Communicate orally and in writing with county officials, other county departments consultants, contractors, architects, engineers, outside agencies and the public on assigned projects.
- Research and plan the various mechanisms used to finance projects such as state and federal grants, county funding, lease purchase agreements, certificates of participation, and joint powers agreements.
- Keep projects within approved budget, and on their approved schedule; analyze claims, project costs, verify expenses, obtain fiscal approval when required and approve contractor/ consultant payment requests.
- Prepare, review and manage contracts, construction documents and technical reports for the development of new county facilities and the alteration of existing facilities or major maintenance projects; and requests for proposals and selection of various consultants and participate in their selection.
- Assure that the pre-architectural work and conceptual designs meet the County's needs and are compatible with master plans.
- Evaluate existing facilities and conduct on-site visits to identify repair or renovation projects and/or observe and approve work.
- Prepare correspondence, communication and reports for the Board of Supervisors.
- Administer construction contracts, including inspection work, contract revisions, submittals, payments, schedules, budgets and project closeouts.
- Act as coordinating liaison with county officials, consultants, contractors, architects, engineers, outside agencies and the public regarding capital improvement projects.
- Maintain all project documents, recommend acceptance of assigned projects as being complete and perform project closeout.
- Manage permit applications, resolve claims and disputes, and file notices.
- Serve as a point of contact for county departments and act as liaison on projects; provide input and recommendations regarding technical and financial aspects, and coordination of various construction activities.
- Work with consultants, architects, engineers, end users, building inspectors, maintenance and operations staff, contractors and vendors during the course of projects.
- Perform related duties as assigned.

Qualifications

Knowledge of:

- Concepts of cost estimating, budgeting and scheduling techniques.
- Architectural planning, detailing and design practices and standards.
- Modern construction design methods and practices including, building construction materials.
- Principles, practices, theories and techniques of construction management including management of all phases of project delivery from project planning to post-construction.
- Structural, mechanical and electrical engineering principles as related to capital projects.
- Project development, management and finance mechanisms.
- Contract negotiation and management practices.
- Codes, ordinances, laws and environmental standards and requirements, including LEED.
- Construction administration including the roles and responsibilities of the various architectural/engineering disciplines, construction managers, contractors and other professionals in the design/construction process.

- Construction safety standards, procedures, best practices and personal protective equipment.
- Construction project management software and other various computer programs and applications relevant to the position.
- Contract negotiation, building cost estimates and budget preparation and control.
- Computer technology and management information systems.

Skill/Ability to:

- Analyze department and County needs for new or remodeled facilities and make recommendations, prepare project scopes, budgets and schedules to meet those needs.
- Adhere to and manage project deadlines and time constraints, both practical and contractual.
- Negotiate and prepare contract agreements for construction and remodeling projects.
- Manage construction projects from inception to completion.
- Communicate effectively orally and in writing.
- Establish and maintain cooperative working relationships with those contacted in the course of the work.
- Anticipate, investigate and research a wide spectrum of technical problems and develop alternative solutions.
- Apply architectural and/or engineering techniques and methods.
- Review and approve designs and contract documents for program compliance.
- Prepare, maintain and monitor accurate project budgets, schedules and records.
- Prepare and present a variety of reports and correspondence.
- Use a personal computer for basic spreadsheet, word processing and project management programs.
- Drive to and from jobsites located throughout the County; walk construction sites and/or natural terrain; climb ladders, scaffolds, lifts and inspect confined spaces to observe and approve work.

Education and Experience:
Any combination of education and experience that would likely provide the required knowledge, skills and abilities is qualifying. A typical way to qualify is:

Education: Graduation from an accredited college or university with a major in Architecture, Engineering, Construction Management or a closely related field.

Experience: Three years of experience as a construction superintendent, project manager or estimator for commercial or industrial construction, or as a superintendent of buildings and grounds for large complexes, or as a construction contract administrator in a public agency.

Previous Classification

Building Divisions Project Manager
Construction Projects Manager

Date Established/Revised

Est: 4/9/86
Rev: 01/19/2012

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Associate Planner

Class Code: L84

Bargaining Unit: SEIU Local 521 - Administrative, Professional, and Technical Unit

COUNTY OF SANTA CLARA
Established Date: Nov 3, 1958
Revision Date: Jan 26, 2016

SALARY RANGE

$46.09 - $55.79 Hourly
$3,687.28 - $4,463.36 Biweekly
$7,989.11 - $9,670.61 Monthly
$95,869.28 - $116,047.36 Annually

DEFINITION:

Under general direction, to provide service to the public and permit applicants, to review and process development applications for cities, agencies and other county departments, to conduct planning studies, feasibility studies, master plans and concept plans, to perform research and analysis of planning data, and to assist in the administration of zoning, planning, or parks and recreation development programs.

DISTINGUISHING CHARACTERISTICS:

The Associate Planner is the full journey level class in the Planner series The Associate Planner is distinguished from the entry level class of Assistant Planner in that the Associate Planner performs professional planning work of moderate difficulty, including coordinating the work on minor projects. The Associate Planner is fully aware of established procedures, regulations and policies, possesses the increased specialized knowledge of the planning field, and the expertise within one or more planning specialties such as community or architectural design, historical resources, agricultural preservation, housing, airport land use, open space, habitat protection or environmental planning. Although Senior Planners and higher level managers assign and review the work of the Associate Planner, Associate Planners receive general supervision when compared to the Assistant Planner.

TYPICAL TASKS:

- Participates in the development and management of planning studies, feasibility studies, master plans and concept plans, coordinates the work on minor projects, and reports on topics, such as land use, housing, historic resources, environmental impacts

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and economic development, in support of new or updated plan policies, regulations or programs;
- Analyzes and reviews land development applications, site plans and building permit applications for completeness and conformance with policies, ordinances, master plans, concept plans, County General Plan, conditions of approval, and State and Federal regulations, prepares conditions of approval where necessary, and takes discretionary action on certain land development projects that are reviewed at the staff level, making required findings;
- Abstracts information from aerial photographs, subdivision maps, census reports, building permits, etc., for analysis in planning studies;
- Analyzes geographic information systems data and creates maps;
- Prepares maps, plans, graphs, and other visual aids;
- Performs field inspections to gather data relevant to planning projects and the development review process and/or to verify that development projects comply with approved plans or to initiate actions necessary to correct violations of regulations or project conditions;
- Prepares recommendations and presents detailed reports on development applications, master plans, concept plans, feasibility studies and other planning-related documents to decision-making bodies such as Board of Supervisors, Parks and Recreation Commission, Planning Commission, Airport Land Use Commission, Historical Heritage Commission, Housing, Land Use, Environment and Transportation Committee, and San Martin Planning Advisory Committee;
- Enters development permit information and permit process workflow data in a central database;
- Tracks application and project expenses and verifies the accuracy of invoices;
- Coordinates staff, agency and community review of development applications, zoning and plan amendments;
- Answers inquiries and provides general information to the public regarding land use projects, permitting procedures, development policies, plans, zoning ordinances and other regulations;
- Provides information to the public regarding the permitting and development review requirements of other County departments such as Fire Marshal's Office, Environmental Health, Land Development Engineering, Geology, Roads and Airports, and Building, and County programs such as Williamson Act, Historic Preservation, and the Santa Clara Valley Habitat Plan;
- Provides customer support for the preparation and processing of routine to moderately difficult development applications, re-zonings, and plan amendments;
- Writes and delivers presentations;
- Participates in meetings, conferences, and workshops;
- Prepares environmental documents in compliance with the California Environmental Quality Act (CEQA) such as Categorical Exemptions, Negative Declarations or Addendum to Environmental Impact Reports;
- Conducts in-depth property specific research including the review of deeds and other legal documents;
- Conducts outreach to community groups, government agencies, developers and the public to encourage participation, resolve problems or obtain input;
- Resolves issues and complaints from the public or neighbors and permit applicants;
- Attends evening meetings;
- May be assigned as a Disaster Service Worker, as required;
- Performs related duties as required.

EMPLOYMENT STANDARDS:

Possession of a Bachelor's degree from an accredited college with a major in planning, architecture, engineering, landscape architecture, natural resources, social science or related

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field;

-AND-

Two (2) years of professional planning experience. A Master's degree in planning may be substituted for two (2) years of the required experience. A Master's degree in a closely related field may be substituted for one (1) year of the required experience.

Possession of a valid California Driver's License prior to appointment and the ability to qualify for and maintain a County Driver's Permit.

Possession of license, registration or certification in a related field, such as American Institute of Certified Planners (AICP), is desirable.

Knowledge of:

- Principles and practices of planning and zoning administration;
- Environmental protection regulations such as California Environmental Quality Act (CEQA), National Environmental Policy Act (NEPA), Clean Water Act, National Historic Preservation Act, and Endangered Species Act;
- State and local laws pertaining to land use such as Williamson Act, Historic Preservation Program, and Santa Clara Valley Habitat Plan;
- Relationship of land use planning to the requirements of other County departments such as Fire Marshal's Office, Environmental Health, Land Development Engineering, Geology, Roads and Airports, and Building;
- Principles of effective customer service;
- Research, report writing and presentation techniques;
- Statistics and math applicable to planning and property development;
- Common computer applications such as word processing, spreadsheet, database management, internet, and geographic information systems.

Ability to:

- Review project descriptions, plans or field conditions and apply policy and code provisions to determine conformance;
- Interpret the zoning ordinance and other policy documents;
- Perform research and analysis of data; Prepare clear and concise reports;
- Communicate technical reports, policies and ordinances to the public and decision-making bodies;
- Build relationships and work respectfully, tactfully and creatively with the public, agencies and staff;
- Speak and write effectively;
- Manage multiple projects and issues effectively and meet firm deadlines;
- Work independently or in a team environment.

County of Santa Clara

Capital Projects Manager I

CLASS CODE	L69	**SALARY**	$59.56 - $72.42 Hourly $4,764.64 - $5,793.68 Biweekly $10,323.39 - $12,552.97 Monthly $123,880.64 - $150,635.68 Annually
BARGAINING UNIT	Engineers & Architects Association	**ESTABLISHED DATE**	June 13, 1995
REVISION DATE	November 20, 2017		

Definition

Under general direction, to provide project management, liaison, inspection, and contract administration for the design, construction and modification of County buildings, facilities and structures.

Distinguishing Characteristics

This is the first working level in the series. Incumbents are responsible for small to moderate-sized projects in terms of dollar amount, technical complexity and permitting requirements. Projects at this level typically have a value of $5 million dollars or less.

Typical Tasks

- Develops project scope, budget, funding, and schedule;
- Manages consultant and contractor selection process and participates as a member of consultant selection committee and is responsible for fee negotiations and approval of contracts;
- Communicates among the County, consultants, and other interested agencies or parties;
- Assures that project program and conceptual design meet the County's needs and are compatible with master plans;
- Responsible for keeping projects within approved budgets on their approved schedule; Analyzes claims and approves consultant/contractor payment requests;
- Participates in public hearings; Prepares and presents project reports;
- Provides guidance to consultant on project criteria, regulations, codes, standards and schedules;
- Identifies and manages responses to CEQA, ADA, energy conservation, and other special requirements;
- Evaluates existing facilities;
- Reviews and approves technical reports, designs, and contract documents to assure adequacy, compliance with project program and constructability and cost efficiency; Coordinates the review of such documents by other County staff and/or consultant peer reviewers;

- Secures the approval of designs and construction documents by the appropriate governmental agencies;
- May produce technical reports, studies, architectural/engineering contract documents and technical specifications;
- Inspects progress and approves the completion of construction projects;
- May assign and approve the work of construction inspectors;
- May be assigned as a Disaster Service Worker, as required;
- Performs other related duties as required.

Employment Standards

Sufficient education, training and experience to demonstrate the attainment of the knowledge and abilities listed below.

Training and Experience Note: Training and experience equivalent to possession of a Bachelor's Degree from an accredited college with a major in Architecture, Engineering (Civil, Mechanical or Electrical), Landscape Architecture, Construction Management or a closely related field;

AND

Two (2) years of recent experience in architecture, landscape architecture, or engineering project design and construction, construction management, or space planning as a fully licensed professional, or under a licensed professional.

Possession of California driver's license, upon appointment, and ability to qualify for and maintain County driver's authorization.

Knowledge of:

- Modern construction and design methods and practices;
- Roles and responsibilities of the various architectural/engineering disciplines, construction managers, contractors and other participants in the design/construction process;
- Basic concepts of cost estimating, budgeting, and scheduling techniques;
- Applicable California codes, laws and regulations pertaining to public building projects;.
- Project deadlines and time constraints, both practical and contractual;
- Computer use and knowledge of various programs and applications relevant to the position.

Ability to:

- Analyze departmental needs relating to small design and construction projects and prepare project scope budgets and schedules appropriate to the classification level;

- Coordinate the planning and program administration of small design and construction projects appropriate to the classification level;
- Negotiate contracts for consultant services for small design and construction projects appropriate to the classification level;
- Effectively communicate in oral and written form;
- Prepare project reports and correspondence;
- Make presentations to the public and various agencies.

City of San Jose

Planner II

CLASS CODE	4122	**SALARY**	$101,468.64 - $123,264.96 Annually
ESTABLISHED DATE	February 01, 1980	**REVISION DATE**	November 01, 2014

CLASS SUMMARY

Performs beginning and journey-level professional planning duties in the fields of long-range planning, current planning, data analysis and related work as required.

DISTINGUISHING CHARACTERISTICS

This is a three-level flexibly staffed class which is the first in the professional planning series. Planner III incumbents may provide training and lead direction to Planner I/II. These flexibly staffed classes differ from that of Planner IV in that an incumbent of the latter class is the full supervisory level manager and has responsibility for formulating and administering City policies or programs relative to the team, program or function to which they are assigned.

MINIMUM QUALIFICATIONS

(These qualifications are typically required. An equivalent combination of education and experience sufficient to satisfactorily perform the duties of the job may be substituted.)

Education and Experience

- **Planner I:** Bachelor's Degree from an accredited college or university in urban or regional planning, urban design, urban studies, architecture, landscape architecture, urban geography, or environmental studies or a closely related field.
- **Planner II:** Bachelor's Degree from an accredited college or university in urban or regional planning, urban design, urban studies, architecture, landscape architecture, urban geography, or environmental studies or a closely related field and two (2) years of entry-level professional planning experience.
- **Planner III**: Bachelor's Degree from an accredited college or university in urban or regional planning, urban design, urban studies, architecture, landscape architecture, urban geography, or environmental studies or a closely related field and four (4) years of professional planning experience including two (2) years of experience at the City of San Jose Planner II level or equivalent.
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    - **Acceptable Substitution (for Planner III):** Master's Degree or sixty (60) semester hours of graduate course work from an accredited college or university in urban or regional planning, urban design, urban studies, architecture, landscape architecture, urban geography, or environmental studies or a closely related field can substitute for the two years of professional planning experience equivalent to Planner II.

Licensing Requirements (such as driver's license, certifications, etc.)
Possession of a valid driver's license may be required for some assignments.

OTHER QUALIFICATIONS

(Incumbents may be required to have different combinations of the listed qualifications, or more specific job-related qualifications depending on the position.)

Minimum Knowledge, Skills and Abilities (Needed at entry into the job in order to perform the essential duties.)

Knowledge of:

- Principles, practices, and purposes of City Planning and current trends in Federal, State, and local planning.
- Nomenclature, symbols, methods, practices, techniques, and instruments used in planning, drafting, mapping, and statistical analysis as applied to land use, transportation and circulation.
- Zoning, subdivisions, planning law, CEQA/NEPA, and general plan studies.
- Organization of local government and concepts of public administration.
- Team leadership, presentation, and project management principles. (at the Planner III level)

Ability to:

- Use computers and software such as Microsoft Office Suite, GIS, graphics/presentation programs, database management programs, and other comparable programs.
- Collect, analyze and interpret data pertaining to planning and zoning projects.
- Carry out complex oral and written instructions and prepare comprehensive and precise oral and written reports.
- Establish and maintain effective working relationships with others.
- Read, interpret and analyze architectural and landscape plans. (at the Planner III level)
- Interpret maps and legal descriptions (at the Planner III level)

Desirable Qualifications (likely to contribute to more successful job performance; can often be learned on the job):

Knowledge of:

- Principles and techniques involved in the development and maintenance of a comprehensive general plan, specific plans, and community plans.
- Accepted practices of local and state laws and regulations relating to municipal planning and zoning.
- Statistics and statistical analysis as applied to land use.
- Team leadership and project management principles.

Ability to:

- Read, interpret and analyze architectural and landscape plans.
- Prepare and interpret maps and legal descriptions.
- Analyze and interpret statistical, economic, and highly technical data pertaining to City planning.
- Speak clearly and effectively before professional, governmental, civic, and business groups.

Represent the City's interest and coordinate programs with local and regional agencies

TYPICAL CLASS ESSENTIAL DUTIES

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DUTY NO.	TYPICAL CLASS ESSENTIAL DUTIES: (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:	FREQUENCY*
1.	Oversees and coordinates land use entitlements including zonings, development permits, administrative permits and other procedures by analysis of projects for conformance with City Policy and Ordinance, meeting and conferring with applicants, preparation of written correspondence, reports and legal documents, oral presentations at community meetings and public hearings and coordination with representatives of other City Departments and outside agencies.	Continuous
2.	Provides information and direction to professionals, developers and the general public concerning the General Plan, Planning related code interpretations such as but not limited to Zoning, Sign, CEQA, Historic Preservation, Planning development policies and guidelines, and status of land development projects.	Frequent
3.	Participates in the review of the General Plan, analyzing land use compatibility issues, economic implications and consistency with other City policies for possible changes to the City's General Plan initiated by staff, the City Council or private individuals.	Frequent
4.	Participates in the preparation of Specific Plans, special studies, land use policies and updates to the City's Planning development codes including the Zoning Ordinance and Sign Ordinance.	Frequent
5.	Conducts research, data management, analysis and reporting in support of other Planning activities. Typical areas addressed include population characteristics, land development patterns, and maintenance of GIS layers and relational databases.	Frequent
6.	Reviews and prepares environmental documents to meet the requirements of the California Environmental Quality Act (CEQA) or other governing environmental regulations. Includes the analysis of potential environmental impacts associated with a project, review of technical reports prepared by environmental consultants, research of regulatory and technical issues and other analytical work.	Occasional
7.	Prepares and delivers oral and written reports and recommendations on land use decisions at staff meetings, community meetings and public hearings. Prepares supporting visual presentation materials utilizing a variety of computerized and non-computerized presentation techniques.	Occasional
8.	Performs record keeping activities including the creation and maintenance of computerized tracking databases such as the Application Management and Data Automation (AMANDA) system.	Occasional
9.	Performs other duties of a similar nature or level.	As Required

*Frequency defined as %, (totaling 100%) *or* "Continuous" (daily or approximately 20%+), "Frequent"(weekly or approximately 15%+), "Occasional"(monthly or approximately 10%+), "As Required"(Intermittent or 5% or less)

ATTACHMENT 1

City of San Jose

Structure/Landscape Designer II

CLASS CODE	3842	**SALARY**	$114,070.32 - $144,406.08 Annually
REVISION DATE	January 01, 2003		

CLASS SUMMARY

Under general supervision, performs a variety of professional work of moderate difficulty in municipal public works construction or maintenance projects. Performs related work as required.

DISTINGUISHING CHARACTERISTICS

This is the second level in a four-level professional series and is flexibly staffed with the Structure/Landscape Designer I class. Incumbents perform a variety of professional work of moderate difficulty in the investigation, development, construction, and maintenance of municipal projects, under general supervision of an Associate Structure/Landscape Designer or Senior Architect/Landscape Architect. This class differs from the class of Structure/Landscape Designer I in that incumbents of the latter perform entry level professional work under immediate supervision and are in training to handle more responsible assignments. This class differs from the next higher class of Associate Structure/Landscape Designer in that incumbents of the latter class are responsible for complete major municipal construction and design projects and perform work of considerable difficulty under direction.

MINIMUM QUALIFICATIONS

Education and Experience

Graduation from an accredited College or University with a Bachelor's Degree in the designated specialty and one (1) year of increasingly responsible professional experience at a level equivalent to Structure/Landscape Designer with the City of San Jose.

Acceptance by the State of California for professional registration testing may be substituted for the degree. Proof of acceptance must be provided at the time of application.

Licensing Requirements

Possession of a valid California driver's license may be required.

OTHER QUALIFICATIONS

Minimum Knowledge, Skills and Abilities:

- Knowledge of the principles and practices of the desired discipline.
- Knowledge of the strengths, properties and uses of materials of construction.
- Knowledge of the ability to perform varied drafting assignments.
- Knowledge of supervision principles and practices.
- Knowledge of legal contractual terminology and ability to analyze and review legal documents.
- Ability to write clear and concise reports.

- Ability to perform analysis for code compliance.
- Ability to prepare estimates, designs, plans and specifications.
- Ability to supervise technical staff.
- Ability to perform entry level research work and prepare technical reports.
- Ability to coordinate project management and to administer consultant contracts.
- Ability to develop and prepare technical reports.
- Ability to direct the inspection of facilities under construction or repair.
- Ability to communicate effectively, both orally and in writing.
- Ability to prepare master and detailed plans, construction specifications and cost estimates, sketches and color renderings.
- Ability to establish and maintain effective working relationships with others.

TYPICAL CLASS ESSENTIAL DUTIES

DUTY NO.	TYPICAL CLASS ESSENTIAL DUTIES Duties may include, but are not limited to, the following:	FREQUENCY
1.	Plans work and supervises sub-professional workers in field investigation and surveys in the course of routine project development	
2.	Reviews, analyzes and computes field data.	
3.	Prepares designs, plans and specifications for conformance to established standards and directs the inspections of facilities under construction or repair.	
4.	Consults with public and private consultants, contractors, and owners relative to construction and maintenance of public works facilities as assigned.	
5.	Prepares technical reports requiring research.	
6.	Coordinates project management by overseeing, controlling and guiding construction of project.	
7.	Prepares or reviews plans and specifications, prepares bidding documents, solicits bids, awards contracts, administers the contract, interprets plans and specifications, resolves field problems, gives	

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	final inspection and follows through with acceptance of project.	
8.	Administers consultant agreements.	
9.	Issues and reviews legal documents such as construction agreements, bonds, insurances, and fees.	
10.	Designs building projects to comply with all applicable codes and regulations.	
11.	Develops schematic and preliminary building design concepts.	
12.	Prepares reports and Council memos for City projects.	
13.	Participates in coordinating a full range of project management activities necessary to take a project from project definition through design, public bidding, construction and to completion of the project.	
14.	Coordinates projects with other City departments, flood control districts, other public agencies and community groups and citizen organizations.	
15.	Provides analysis and cost estimates of construction.	
16.	Licensed Architects and Landscape Architects may be responsible for signing off and approving construction plans and drawings for professional landscape architecture work.	As Required
17.	Performs other duties of a similar nature or level.	

ADDITIONAL INFORMATION

PHYSICAL REQUIREMENTS

	Climbing		Kneeling		Crawling
	Balancing		Lifting	X	Reaching

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	Stooping	X	Fingering	X	Standing
X	Talking		Grasping	X	Walking
X	Hearing		Feeling		Pushing
	Crouching				

Sedentary Work: Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.

Midpeninsula Regional Open Space District

Memorandum

DATE: Tuesday, July 8, 2025

MEMO TO: Midpen Board of Directors and Action Plan and Budget Committee

FROM: Amanda Mills, Resource Management Specialist II
Arianna Camponuri, Resource Management Specialist II
Ariel Starr, Resource Management Specialist I
Coty Sifuentes-Winter, Senior Resource Management Specialist
David Liefert, Senior Resource Management Specialist
Karine Tokatlian, Resource Management Specialist II
Kylie Kammerer, Resource Management Specialist II
Matt Sharp Chaney, Acting Senior Resource Management Specialist

SUBJECT: Joint Public Comment on Proposed Amendments to the Classification & Compensation Plan (R-25-87)

As members of the Natural Resources Department, we appreciate the opportunity to comment on the proposed amendments to the Classification & Compensation Plan (R-25-87), scheduled for consideration on July 8, 2025. We sincerely thank the Board, General Manager's Office, and Human Resources for the thoughtful work already undertaken to address compensation equity. We are writing collectively to request that the Resource Management Specialist (RMS) classification series, at all levels, be included in the proposed compensation adjustments, to reflect parity with equivalent roles in the Planning and Capital Project Manager (CPM) series.

Please note that Natural Resource staff were given the results of the study on Tuesday, July 1, leaving less than one week to review the compensation study. Several team members were out of the office during this time due to the holiday. This limited review window did not allow for the adequate vetting of the comparator classifications or a comprehensive departmental response.

The NR Department: Central to Mission Delivery

The Natural Resources Department plays a foundational role in delivering Midpen's mission to preserve, protect, and restore the natural environment and provide for ecologically sensitive public enjoyment. We are stewards of both long-term ecological health and near-term public access, balancing resource protection with capital improvements. Without robust staffing in the RMS series, Midpen would not be able to meet its central mission or goals for climate resilience, habitat connectivity, and sustainable land management.

Our team leads the planning, permitting, and execution of ecological restoration and capital improvement projects, wildfire resiliency initiatives, biodiversity conservation, sensitive species

recovery, development and review of resource policy and management plans, invasive species control, water-supply planning and infrastructure design, and environmental compliance, much of it on a landscape scale and in collaboration with Planning and Engineering & Construction. Because most projects at Midpen require the same core elements of project management, staff across these project delivery departments routinely carry out work of comparable scope, complexity, and responsibility. This overlap enables strong interdepartmental partnership and more efficient project delivery, as duties and leadership roles can be shared based on staff expertise rather than rigid departmental boundaries.

In addition, our staff are frequently called upon by regional, state, and even out-of-state agencies to serve as expert witnesses, provide testimony before legislative bodies in Sacramento, and contribute to the development of new legislation, species listing determinations, standards and best management practices.

Alignment of Duties Across Departments

Across the RMS series, from entry to senior level, staff regularly perform work equivalent to Planning and Capital Project Manager classifications, including:

- Leading multi-million-dollar capital improvement and ecological restoration projects
- Coordinating and authoring Program Environmental Impact Reports (PEIRs) and associated CEQA documentation
- Managing complex consultant and contractor teams across multiple preserves
- Developing consultant requests for proposals and bid processes for professional and construction services
- Designing, permitting, and implementing fire, vegetation, and ecological management projects with multi-disciplinary teams
- Obtaining and administering programmatic permits utilized by multiple departments for project delivery and compliance with regulatory requirements
- Developing and implementing policies in support of Midpen programs, including Conservation Grazing and Agriculture
- Providing review for other external land management projects to improve environmental outcomes
- Tracking grant deliverables, collaborating with regulatory agencies, and ensuring compliance with federal, state, and local laws

This level of interdisciplinary, multi-agency project leadership, fiscal responsibility, and regulatory oversight matches the scope and complexity of duties performed by Planner I/II/III/Senior and CPM I/II/III/Senior staff. In fact, projects are occasionally transitioned between the Natural Resources and Planning or Engineering & Construction departments with minimal disruption. Additionally, Natural Resources staff scope, design, and permit projects that may be implemented by Engineering & Construction, reflecting the strong alignment in technical competencies and project management expectations across these classifications. However, only Natural Resources staff have

consistently demonstrated the specialized expertise required to lead complex environmental permitting efforts essential to project delivery across all departments.

Compensation Disparities and Structural Misalignment

The current and proposed classification plan continues to place the RMS series one or more salary ranges below the Planning and CPM series, despite equivalent responsibilities. Failing to include RMS positions in the current amendment exacerbates an internal equity gap that undervalues essential mission-aligned work.

Ongoing Recruitment and Retention Challenges

Midpen has experienced significant challenges in recruiting for RMS positions, particularly at the junior and senior levels. Two out of five current AO staff vacancies are in the Natural Resources Department, with the other three spread evenly between Grants, Information Systems and Technology, and Budget and Finance. In recent years, we have:

- Not seen enough highly qualified applicants despite targeted outreach and extended recruitment periods
- Re-flown multiple recruitments for the same position due to underqualified candidate pools
- Left positions open without clear recruitment timelines, stretching vacancies for months and delaying critical work
- Received feedback that compensation does not align with the leadership responsibility or regional salary expectations for this type of project management and technical work

Staffing challenges reflect the unique skillset required to fulfill RMS position descriptions and full extent of responsibilities. Staffing challenges also directly impact Midpen's ability to move forward with time-sensitive restoration and capital projects, regulatory deliverables, and grant-funded commitments. In some cases, these gaps risk compliance violations or lost funding opportunities. The longer positions remain vacant, the greater the burden on current staff, and the greater the risk of project delays and staff burnout. Moreover, vacancies necessitate a greater utilization of consultants to accomplish the District's mission-critical work, resulting in substantially higher labor costs than if the work were completed by equally qualified Midpen staff. These higher external labor costs are directly opposed to the District's aim of fiscally responsible land management.

These challenges are not unique to Midpen, but they underscore the importance of staying competitive. Over the last few years, several public agencies paused or canceled recruitments for natural resources roles altogether due to chronically underqualified applicant pools. Notably, 25% of the comparator agencies used in the study are also actively recruiting resource management staff, reinforcing the reality of a tight labor market.

Incorrect Comparator Used

We also wish to raise a concern regarding the use of inappropriate benchmark classifications in compensation analysis, such as from the City and County of San Francisco. The District's

consultant compared the RMS classification to San Francisco's Natural Resources Specialist role. This is not an appropriate comparator as this is a field-based, technician-level role more akin to Midpen's Open Space Technical (OST). The appropriate comparator in San Francisco's structure is the Biologist (Class 2483), which includes duties such as project permitting, CEQA documentation, ecological planning, consultant oversight, and habitat restoration leadership. The difference in salary between these two different classifications is over 22%.

We urge the Committee and HR staff to revisit the comparator selection process in light of these concerns and ensure that future compensation studies are conducted with appropriate classifications and a meaningful opportunity for staff review.

Our Request

We respectfully request that the Action Plan & Budget Committee:

- Amend the Classification & Compensation Plan to adjust salary ranges for the entire RMS classification series
- Better align RMS compensation with the Planning and CPM series to reflect consistent levels of responsibility, technical expertise, and leadership
- Support equitable recognition of the Natural Resources team's central role in delivering Midpen's mission

Compensation parity is not just about fairness— it's about function. Without a strong RMS team, Midpen cannot deliver on its mission to preserve and restore the natural environment. Many RMS job functions directly overlap with those of the Planning and CPM series, all of which require a specialized technical skillset and a high level of project management complexity. Given this alignment, the RMS classification series deserves compensation parity with equivalent roles in Planning and CPM series. Our department is not peripheral— it is integral to Midpen's mission and ability to protect natural resources, implement major capital projects in an ecologically sound manner, and meet state and regional conservation goals.

We appreciate your leadership and your time in addressing this inequity.

CC: Ana Ruiz, General Manager
Brian Malone, Assistant General Manager
Kirk Lenington, Natural Resources Department Manager
Candice Basnight and Rebecca Wolfe, Human Resources

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Midpeninsula Regional Open Space District

Memorandum

DATE: June 18, 2024

MEMO TO: Midpen Board of Directors

FROM: Melissa Borgesi, Planner II; Mattea Ottoboni, Planner II; Brittany Wheatman, Planner II; Tyler Smith, Planner III; Galli Basson, Planner III; Ashley Mac, Planner III; Tina Hugg, Senior Planner; Gretchen Laustsen, Senior Planner; Jared Hart, Senior Planner

SUBJECT: Planning Staff Response to Benchmarked Positions used in the Planner II Benchmark Compensation Study and Request to Align Planner II Compensation to Capital Project Manager II and Initiate Classification Study in FY25

INTRODUCTION

Thank you for the opportunity to comment on the results of the Gallagher / Koff & Associates (Koff) 2023-24 Compensation Study (Koff study) regarding Koff's analysis of the benchmarked Planner II position. After thorough review and research, the Planning Department staff have concluded that we disagree with the results of Koff's study. This disagreement arises mainly from the study's exclusion of Planner II's primary function in project management across most of the comparator agencies. Koff's analysis over-simplified the District Planner II position and compared it with positions that do not reflect the complexity of the job as written. In addition, the current job description is out of alignment with actual duties. Both these issues will continue to result in inaccuracies in future compensation studies.

Additionally, the Planner II series is out of alignment with other II series employees at the District with the Planner II series being compensated a lower level than other II series. The difference in pay will continue to grow with future cycles of cost-of-living adjustments and compensation studies. Therefore, Planning staff request the following:

- Align compensation of Planner II with Capital Project Manager II (CPM II).
- A classification study for the Planner series be accelerated to begin in fiscal year 2024-2025 so that the duties of the Planner II series can be more accurately classified and to correct internal misalignment between other District II series.

DISCUSSION

KOFF & ASSOCIATES COMPENSATION STUDY RESPONSE

Koff's initial study was shared by HR with Planning staff on February 26, 2024. After conducting thorough research on job classifications at comparator agencies, Planning staff identified more accurate benchmark positions that closely align with the Planner II job description as the position is currently written. A memo from the Planning staff (Attachment 1 and 2), requesting changes to the benchmarked positions, was sent to Koff through HR on March 4, 2024. This memo includes analyses of the primary functions of Planner II, a comparison of recommended benchmark position job duties with detailed reasoning and annotated matching job descriptions of each comparator agency and the District CPM II.

Planning staff met with the General Manager, Assistant General Manager, and Human Resources staff on April 24, 2024 to discuss the Koff study and the outcome of Koff's review of Planning staff's memo. Koff's response (Attachment 3) rejected Planning staff's recommended changes with little explanation. Koff's short rejections were based on job duties that were out of with the scope of the Planner II job duties without addressing the areas where job duties did overlap and were in alignment.

Planning staff's initial memo to Koff (Attachment 1) emphasized the need to recognize project management functions performed by District Planner IIs, which are not the typical duties performed by journey-level planners at cities and counties of comparator agencies, who primarily facilitate applicant projects through their agencies' respective approval processes in compliance with their local land use regulations. Recognizing this gap in comparable job functions, Planning staff's analysis identified positions at comparator agencies that include these project management duties and experience with administering and managing projects and contracts that the District Planner II's regularly perform. Planning staff acknowledges that some of these positions have an expectation to supervise other staff, which is not something District Planner II's are classified to do and may require more than two years of experience, which exceeds the years of experience required of the District Planner II position. Recognizing that some of these positions are more senior, Planning staff's approach focused on job functions and made recommendations to use a hybrid of two positions with significant overlap in functions with the Planner II position in order to recognize the project management job functions that are largely absent from Koff's recommended positions. Hybrid matches are included in Koff's methodology as way to satisfy the criteria for matching the District's benchmarked position to two positions at comparator agencies.

In Planning staff's response to Koff, staff highlighted all the job functions that aligned with Planner II and provided supplemental written justification for the staff recommended benchmark positions. Koff's response provides a brief rejection of planning staff's recommendations, based on a few job duties that do not apply to the Planner II position, or level of experience required for the position. There is a lack of a comprehensive response to Planning staff and Koff does not address Planning staff's main point that the Planner II position performs project management duties typically not found in the Koff-recommended matched positions. Planning staff were not asking for an exact match, but to be recognized for the complex project management duties that are performed by the Planner II position. For that reason, Planning staff's recommendations for more appropriate benchmark positions included hybrid matches or more experienced positions that should have been considered more thoroughly (refer to Attachment 1, Pages 3-6 for staff-recommended comparator positions and justifications). Due to these reasons, we do not agree with the results of Koff's compensation study.

ACCELERATION OF CLASSIFICATION STUDY

Planning staff's request to be recognized for the project management duties the Planner II position performs further supports the need for the District to accelerate a classification study for the Planner II position to begin in fiscal year 2024-2025. The compensation study revealed that the Planner II job description is out of alignment with current Planner II job duties and the needs of the District to deliver complex planning projects. The longer that the Planner series is out of alignment with job duties, the longer staff will be compensated less than their peers, widening the pay gap between comparator positions and within the District's organizational structure.

Planning staff would also like to acknowledge that the Koff study as it is presented will have consequences for the future internal alignment of the Planner II series with other II series across the District. The salaries for the Planner II series at Step Range 31, and other II series positions are extremely misaligned (Attachment 4), most being above Step Range 34, despite the work of Planner II series providing equal value to public access as other II series positions. For example, the Capital Project Manager II series and the Planner II series have significant overlap in level of responsibility, complexity of project management duties and technical work, and similar required staff education and experience.

The two positions often work on the same projects, with different departments leading different phases. A reason that the Planner II has been misaligned with the Capital Project Manager II is because of the emphasis of project management in the title of the latter and no emphasis on this core work in the former. In addition, the salary gap between Capital Project Manager II series and Planner II series will only continue to grow larger with annual cost-of-living adjustments, which will make staff recruitment and retention more difficult for the Planning positions. Planning summarized the duties that overlap (Attachment 2, Pages 99-107).

Considering the internal misalignment of the II series and the conclusion of the Planner II benchmark compensation study, we ask that the Board accelerate a classification study for the Planner series benchmark position. A classification study should be prioritized as this study may take another two years to yield results when considering the time between development of a request for proposals for consulting services, conducting the study, and presenting the findings to the Board. Delaying the classification study, in conjunction with annual cost of living adjustments will continue to widen this compensation disparity.

REQUEST TO THE BOARD

Planning staff request the Board align compensation of Planner II with Capital Project Manager II due to the overlap in project management job functions that are performed by Planner II, as described in Attachment 1, pages 6 and 7, and Attachment 2, pages 99-107.

Planning staff respectfully request the Board initiate the classification study in fiscal year 2024-2025 so that the duties of the Planner II series can be more accurately classified and to correct internal misalignment between other District II series and to align compensation of Planner II with Capital Project Manager II.

Midpeninsula Regional Open Space District

Memorandum

Comparator Agency	Classification Title Match - Koff	Review Requested for Recommended Matches - Planning Staff	Koff Response	Planning Rebuttal
Santa Clara Valley Water District (Valley Water)	Assistant Environmental Planner II	Assistant Environmental Planner II /Project Manager	Disagree - maintain match Project manager classification is a supervisory position responsible for legislative analysis and annual work plans - not comparable.	Planning staff recommended a functional hybrid between the Assistant Environmental Planner II and Project Manager. Koff's response does not acknowledge the shared duties between the Project Manager Position and the District Planner II and those duties not included in the Assistant Environmental Planner II. The Project Manager duties description included supervision as only one component of the job, but also included duties that align with the District Planner II including management of part of a major project or total project of moderate scope, perform project management work as a team member for capital and operating projects and strategic issues within District policies. By stating a functional hybrid could not be achieved even though the majority of the job description matches the District Planner II duties, Koff's analysis is not accurate, and **Planning staff maintains its recommendation for a functional hybrid match to Assistant Environmental Planner II and Project Manager.**
Santa Clara Valley Open Space Authority	Associate Open Space Planner	no review		
County of Riverside	Park Planner	N/C	Disagree - maintain match Park Planner is the journey level planner for	Planning staff recommended that the County of Riverside be removed as a comparator agency because there is no comparable position. Koff's analysis states that there is a 70% match to the District Planner II position and the Park Planner position, but this statement ignores most of the Planner II's main project

			park projects, including providing construction supervision and coordinating permits for construction. This makes the 70% threshold for a comparable match.	management duties and including this position skews the analysis. The Park Planner position primarily has simpler duties and does not include any project management, presentations to boards or committees, preparing environmental documents, or contract administration that Planner II performs. Additionally, this job only requires one year of experience and the District Planner II requires two. Most of the duties listed under the Park Planner job description involve other tasks that are not part of the District Planner II scope. Other County of Riverside positions were evaluated by Planning staff including Senior Park Planner, which required the same experience as Planner II, and Environmental Planner, Urban/Regional Planner III, and Facilities Capital Project Manager II, but ultimately none of these positions shared enough of the Planner II duties to represent a match. **Planning staff maintains its recommendation that no other positions at the County of Riverside are a match.**
City of Walnut Creek	Associate Planner	Senior Planner /Project Manager	Disagree - maintain match The Senior Planner is both the supervisory level and zoning administrator - not comparable. The Project Manager is a management level classification with authority to choose vendors/contractors, develops and determines project goals and schedules, and	Planning staff suggested a functional hybrid of the Senior Planner and Project Manager positions within the City of Walnut Creek. Koff's analysis erroneously states that the Project Manager position is not a comparison to the District Planner II because the Project Manager has the authority to choose vendors and contractors, which is listed as a job duty under the District Planner II job description. The District Planner II is also required to have the ability to recommend and implement goals, objectives, and practices for providing effective services, as well as preparing and monitoring scopes, schedules, and budgets. Though the District Planner II is not a zoning administrator or supervisor as the Walnut Creek Senior Planner is, Koff's response neglected to mention the strong overlap of duties including project management, and making presentations to councils, commissions, and citizen groups that are not part of the job duties of the Walnut Creek Associate Planner.

			supervises staff - not comparable.	**While the Senior Planner and Project Manager position are higher level classifications, they meet the criteria of a functional hybrid match due to the shared project management job duties performed by District Planner II, and Planning staff maintains its recommendation for a span in scope hybrid match.**
Midpeninsula Regional Open Space District	**Planner II**			
County of Santa Cruz	Park Planner II	Park Planner III	Disagree - maintain match Park Planner II is the journey level responsible for design and management of assigned projects, makes presentations to internal and community groups as well as decision-making authorities, and oversees and inspects park construction projects. This is the appropriate level match.	County of Santa Cruz Park Planner III performs all of the Park Planner II tasks in addition to more complex tasks. Planning staff recommended the Park Planner III as the more appropriate match because the responsibilities more closely align with the District Planner II including the preparation of technical reports and environmental documents, evaluation of design proposals and construction documents prepared by others, and the presentation of planning studies, analyses, and reports to boards, commissions, and committees which are not included in the scope of the Park Planner II position. There is a 70% match to the Park Planner II position, however, it neglects a number of duties expected of the District Planner II that are not expected of the Park Planner II. Since Park Planner III also meets a 70% match to Planner II and requires the same years of experience, **Planning staff maintains its recommendation of a match to the Park Planner III position.**
City of Palo Alto	Associate Planner	Associate Planner /Senior Planner	Disagree - maintain match Senior Planner is the lead level classification who supervises the environmental impact report process, leading and coordinating the work of other staff members for planning	Planning staff suggested a span in scope alignment for these positions, acknowledging that while not all duties listed under the Senior Planner position are applicable to a District Planner II position, there is significant overlap in responsibilities of this more senior position. Both the District Planner II and City of Palo Alto Senior Planner positions include the full range of project management responsibilities and management of complex agency-wide programs that require extensive coordination between departments and consultants, which is not required for the City of Palo Alto Associate Planner position that was originally compared to.

			projects - not comparable.	**Planning staff maintains its recommendation for a span in scope match to Associate Planner and Senior Planner.**
County of Sonoma	Park Planner II	Park Planner II /Senior Park Planner	Disagree - maintain match The Senior Park Planner is a licensed landscape architect level serving as the subject matter expert in park planning - not comparable.	Planning staff suggested a span in scope alignment for these positions, acknowledging that while not all requirements listed under the Senior Park Planner position are applicable to a District Planner II position, there is significant overlap in responsibilities of this more senior position that should be taken into consideration. The responsibilities of a District Planner II exceed those of the County of Sonoma's Park Planner II in management of more complex projects and undertaking a larger range of functions, including external project review and management of District-wide programs such as the Historic Resources and Signage Programs. **Planning staff maintains its recommendation for a span in scope match to Park Planner II and Senior Park Planner.**
County of Santa Clara	Associate Planner	Associate Planner /Project Manager	Disagree - maintain match Project Manager is a manager classification with responsibility for program development, definition of project guidelines, evaluation of regulatory information, legislative review, management of contracts, and quality assurance auditing - not comparable.	Planning staff suggested a functional hybrid alignment for these positions as the responsibilities of a District Planner II have significant overlap with both Santa Clara County positions, although neither is a direct match. The County of Santa Clara Associate Planner position lacks primary project and consultant management functions in its job description that make up a large part of the work performed by District Planner IIs and these specific responsibilities are instead aligned with the County's Project Manager position. **Planning staff maintains its recommendation for a functional hybrid match to Associate Planner and Project Manager.**
East Bay Regional Park District	Planner	Senior Planner	Disagree - maintain match Senior planner is the lead level classification with authority to select	Planning staff recommended the Senior Planner position instead of the Planner position due to the level of involvement with managing consultants and consultant work required of the Senior Planner position, which aligns with the District Planner II position. Unlike the District, the East Bay Regional Parks District only offers two levels of planner positions, Planner and Senior Planner, and the

			contractors, negotiate terms, easements, and environmental mitigations - not comparable.	District Planner II position most closely aligns with the Senior Planner position due to the project management responsibilities that are not required of the Planner position. District Planner II requires two years of experience, whereas East Bay Planner requires one, and Senior Planner requires three. East Bay's Planner and Senior Planner positions are classified similar to County of Marin's Open Space Planner and Senior Open Space Planner positions. Koff identified that County of Marin is a span in responsibility match with Open Space Planner-Senior Open Space Planner. The project management duties shared by East Bay Senior Planner and Planner II should be acknowledged, and keeping with the same determination Koff made for County of Marin, **Planning staff updates its recommendation to a span in responsibility match to Planner and Senior Planner.**
County of Sacramento	Assistant Planner	Non-Comparator	Disagree - maintain match Assistant Planner is the journey level planner classification with responsibility for environmental impact studies, project planning, coordination with outside agencies, and project compliance. This job description is lacking, but does meet the threshold for 70% comparability.	Planning staff recommended no match for this comparator agency because municipal planners, like those at the county of Sacramento facilitate their agency's approval process and do not perform the project management and contract management functions that are primary functions required of District Planner IIs To address project management and contract management functions performed by District Planner II's a span in scope hybrid match with the Associate Planner would be more appropriate and of greater likeness than Koff's recommended standalone match to Assistant Planner. **Planning staff revises its recommendation to a span in scope hybrid match to Assistant Planner and Associate Planner.**
County of San Mateo	Planner II	Planner II /Capital Project Manager I	Disagree - maintain match	Planning staff recommended a functional hybrid match County of San Mateo's Planner II and Capital Project Management I.

			Capital Project Manager I is a supervisory position with a focus on construction management including cost estimating, budgeting, scheduling, and financing, knowledge of structural and mechanical engineering principles, and experience required as a construction superintendent, or project manager for commercial or industrial construction make this not comparable.	Absent from the County of San Mateo Planner II and all County Planner series positions are project management and contract management functions that are primary functions performed by the District Planner II position. Like other municipal agencies, the County's Planner series largely focuses on facilitating the County's approval process. County of San Mateo's Capital Project Manager I's perform project management and contract management functions that align with District Planner II. While Capital Project Manager I job functions are construction and engineering focused, they require the same skills and ability to develop and manage contracts and project scopes that District Planner IIs also perform in their duties. **Planning staff continues to maintain its recommendation for a functional hybrid match between the County of San Mateo's Planner II and Capital Project Manager I, which would be more appropriate and contributes to a greater likeness than Koff's recommendation to match to County of San Mateo County's Planner II.**
County of Marin	Open Space Planner	Senior Open Space Planner	[Open Space Planner /Senior Open Space Planner] County of Marin: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.	**Planning staff agrees with Koff's revised recommendation.**

Midpeninsula Regional Open Space District

Memorandum

Attachments:

1. March 4, 2024 Memo – Planning staff's feedback on Koff's Compensation Study results
2. March 4, 2024 Memo Attachments (Recommended Benchmark Position Job Duty Comparison, Annotated Job Descriptions, and Annotated Planner II and CPM II Job Descriptions)
3. April 24, 2024 Koff Response
4. Annotated FY23-24 District Salary Schedule

CC: Ana Ruiz, General Manager
Susanna Chan, Assistant General Manager
Jane Mark, Planning Department Manager

Midpeninsula Regional Open Space District

Memorandum

DATE: March 4, 2024

MEMO TO: Candice Basnight, HR Manager
Rebecca Wolfe, HR Supervisor

FROM: Melissa Borgesi, Planner II; Tyler Smith, Planner II; Mattea Ottoboni, Planner II; Brittany Wheatman, Planner II; Galli Basson, Planner III; Ashley Mac, Planner III; Tina Hugg, Senior Planner; Gretchen Laustsen, Senior Planner; Jared Hart, Senior Planner

SUBJECT: Request to Change Benchmarked Positions used in the Planner II Benchmark Compensation Study

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Thank you for the opportunity to submit feedback on the results of Gallagher / Koff & Associates (Koff) 2023-24 Compensation Study (Koff study) that benchmarked the Planner II position. Planning Department staff have reviewed the results of the Koff study, conducted thorough research of job classifications at comparator agencies and have identified more accurate benchmark positions that more closely align with the Planner II job description. The duties and minimum qualifications defined in the job description for District's Planner II align with more experienced planning and project management positions at the comparator agencies that should be analyzed as functional hybrid and span in scope hybrid comparators. Planning department staff request that Koff reevaluate the Planner II benchmark prior to the scheduled April 10th Board meeting based on feedback provided below.

The results of Planning staff's analyses are summarized below.

KOFF & ASSOCIATES COMPENSATION STUDY

The District's Planner II job description lists 22 job functions, a majority of which are specific to project management of planning and capital improvement projects. Project management was not the primary function of planning staff at most of the comparator agencies. Other District's Planner II primary functions include environmental review and external agency review. The remaining job functions listed in the job description may be incidental to these primary functions or performed on a case-by-case basis depending on how a Planner II has been resource loaded to support and/or manage District programs.

Since the adoption of Measure AA in 2014 (one year after Planning's last class and compensation study) and the Financial and Operational Sustainability Model (FOSM) Report in 2015, the structure of the District and that of the Planning department has changed and grown over the past several years. The resulting robust and aggressive Capital Improvement and Action Plans since 2014 necessitate that the Planning department lean on Planner IIs to work on many of the District's most complex, challenging, and politically high-profile projects. Additionally, as outlined in the District's Planner II job description within the Class Characteristics section, "positions at this level usually perform most of the duties required of the positions at the Planner III level".

Staff have excerpted verbatim and reorganized the Planner II job duties to highlight these primary job functions below:

Project Management

- Participates in the scoping, planning, preliminary design and environmental review of capital improvement projects related to new trails, parking lots, or facilities.
- Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary.
- Develops, administers, and monitors planning and engineering consultant contracts; reviews and manages consultant work and compares tasks completed against invoice amounts to authorize payment.
- Confers with and advises design and engineering professionals, building and construction professionals, environmental planners and professionals, attorneys, and the general public regarding District development policies and standards; provides and clarifies information relative to land use, environmental compliance, ADA compliance, historic preservation, capital improvement, and other issues.
- Reviews routine to complex planning projects, which may include land use, management, policy, natural resources, regional, site and long range, and capital improvement planning, design and implementation.
- Prepares staff reports for planning documents and studies, contract solicitation and authorization, permit applications, and grant proposals.
- Compiles information for a variety of studies and reports; researches and reviews previous entitlements and records; develops recommendations and prepares written reports on various planning matters.
- Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings.
- Prepares staff reports for use and management plan amendments, feasibility and planning studies, contract solicitation and authorization, permit applications, and grant proposals.
- Researches and compiles information for the preparation of use and management plans for District preserves and other planning activities; conducts or directs field or background research; meets with District personnel, members of the public, neighbors, and other agency staff to solicit input and identify problems and opportunities; plans and conducts public workshops and resolves issues.
- Develops and solicits consultant requests for proposal for professional services; evaluates proposals and recommends award of contract; administers contracts after award.

Environmental Review

- Conducts and/or assists with the California Environmental Quality Act (CEQA) environmental analysis of capital improvements, facilities, maintenance activities, and proposed new public uses on District lands. Reviews and prepares CEQA documents (e.g., Initial Studies, Categorical Exceptions, Negative Declarations) and sections of CEQA documents (e.g., Mitigated Negative Declarations and Environmental Impacts Reports) as part of the CEQA Coordination program.

External Review

- Monitors and conducts external project reviews to identify potential issues or development proposals of private or public lands near or adjacent to open space preserves that may impact District interests and goals; assists in preparing recommendations to permitting agencies or landowners to minimize impacts on District lands or that may affect District interests; prepares comment letters for review by a more senior level planner or the Planning Manager, as appropriate.

Recommended Position Benchmarks

Below is a summary of Planning staff's review of Koff's Planner II compensation study and research of job classifications at comparator agencies. Through this analysis Planning staff reviewed the study's benchmarked job classifications and identified other positions at comparator agencies that more accurately align with the District's Planner II classification based on the Planner II job description. Refer to Attachment A – Recommended Benchmark Position Job Duty Comparison and Attachment B – Annotated Job Descriptions for a complete justification and detailed comparison between the positions summarized below.

Many of the matched positions in Koff's study contain a very limited scope of abilities, knowledge, and primary functions identified in the job descriptions compared to the District's Planner II classification. While the abilities/knowledge/functions listed in the descriptions of comparator positions appear to match, they do not account for the wide-ranging duties and responsibilities identified in the District's Planner II job description. The Planner II job description contains more breadth of responsibility than many comparator agency positions and does not result in a match between the two positions.

With the exception of the Santa Clara Valley Open Space Authority position, Associate Open Space Planner, all of the matched positions in comparator agencies that were selected for comparison lacked primary Planner II functions such as project management and consultant management. These tasks were typically included in project manager positions and more experienced positions at the comparator agencies. By comparing the Planner II to planner positions at other agencies with less experience and limited scope of responsibility, it misrepresents the breadth of the District's Planner II duties and lowers the salary that befits the skill set and responsibilities of the Planner II position.

The project management primary functions performed by Planner IIs at the District generally are not the typical duties performed by junior planners at cities and counties, who primarily process applicant projects through their agencies' respective approval processes. Project management positions and more experienced planner positions better align with the District's Planner II position, but these do not always exist at the comparator agencies. District Planner IIs manage all aspects of their projects, including administering contracts and managing consultants work, which is observed in more experienced planning positions and project management positions at many comparator agencies.

Comparator Agency	**Benchmark Position**	**Recommended Benchmark Position**
Santa Clara Valley Open Space Authority	Associate Planner	Associate Planner (no change)
East Bay Regional Park District	Planner	Senior Planner
County of Marin	Open Space Planner	Senior Open Space Planner
County of Santa Cruz	Park Planner II	Park Planner III
City of Walnut Creek	Associate Planner	Project Manager-Senior Planner*
Santa Clara Valley Water District	Assistant Environmental Planner II	Assistant Environmental Planner II-Project Manager)*
County of San Mateo	Planner II	Planner II-Capital Project Manager I*
County of Santa Clara	Associate Planner	Associate Planner-Project Manager*
County of Sonoma	Park Planner II	Park Planner II-Senior Park Planner**
City of Palo Alto	Associate Planner	Associate Planner-Senior Planner**
County of Riverside	Park Planner	No Match
County of Sacramento	Associate Planner	No Match
**Functional Hybrid* ***Span in Scope Hybrid*		

Alignment with More Experienced Positions

East Bay Regional Park District (Planner → Senior Planner)

East Bay Regional Park District's (EBRPD) Planner was the benchmarked position to the District's Planner II. However, unlike the EBRPD Planner position, the EBRPD Senior Planner fully manages consultants and consultant work, which better aligns with the District's Planner II primary functions identified in the job description. The EBRPD Planner does not have any project management or consultant management duties and is therefore out of alignment with the Planner II primary functions. The job description for the EBRPD Senior Planner is a more direct comparison to the District's Planner II, as it better matches the scope of tasks and depth of knowledge detailed in the Planner II job description.

County of Marin (Open Space Planner → Senior Planner)

Marin County's Open Space Planner was the benchmarked position to the District's Planner II. However, unlike Marin County's Open Space Planner position, Marin County's Senior Open Space Planner manages all aspects of project management including contract administration and supervision of consultant work, which better aligns with the District's Planner II primary functions identified in the job description. Marin County's Senior Open Space Planner also has an expectation to prepare environmental documents, monitor external projects, and represent their agency at private/public meetings, which are also District Planner II primary functions.

County of Santa Cruz (Park Planner II → Park Planner III)

The County of Santa Cruz's Park Planner II was the benchmarked position to the District's Planner II. However, the County of Santa Cruz's Park Planner III position leads more complex planning projects than the County's Park Planner II position and is expected to lead coordination efforts across multiple organizations. The County's Park Planner III position also makes presentations to the public, boards, commissions, and committees, which are duties completed by District's Planner II and identified in the job description. In addition, the Park Planner III is expected to evaluate design proposals and construction documents prepared by others. The District's Planner II completes the work of the County of Santa Cruz's Park Planner III position and is also responsible for reviewing technical studies completed by subject matter experts and coordinating with staff in other departments. Finally, the District's Planner II requires the same experience and education as the County of Santa Cruz's Park Planner III position, which coupled with the above, makes it a better match to the District Planner II.

Functional Hybrid Alignments

City of Walnut Creek (Associate Planner → Project Manager/Senior Planner)

The City of Walnut Creek's Associate Planner was the benchmarked position to the District's Planner II. However, a functional hybrid match of Walnut Creek's Project Manager and Senior Planner is better aligned with the duties performed by District Planner IIs. This is because the comprehensive project management primary functions outlined in the District's Planner II job description matched those respective duties identified in Walnut Creek's Project Manager and Senior Planner descriptions.

Santa Clara Valley Water District (Assistant Environmental Planner → Assistant Environmental Planner II/Project Manager)

Santa Clara Valley Water's (Valley Water) Assistant Environmental Planner was the benchmarked position to the District's Planner II. However, Valley Water's Assistant Environmental Planner strictly focuses on environmental (CEQA) review. Due to the comprehensive project management functions performed by District Planner IIs and described in the job description, a functional hybrid match of Valley Water's Assistant Environmental Planner and Project Manager is better aligned with the duties performed by Planner IIs.

County of San Mateo (Planner II → Planner II/Capital Project Manager I)

The County of San Mateo's Planner II was the benchmarked position to the District's Planner II. However, the County of San Mateo's Planner II lacks primary project management functions based on the job description and does not align with the District's Planner II position. To address this missing primary function, a match consisting of a functional hybrid with Capital Project Manager I, better aligns with the District Planner II position.

County of Santa Clara (County Parks): Associate Planner → Associate Planner/Project Manager

The County of Santa Clara's Associate Planner was the benchmarked position to the District's Planner II. However, the County of Santa Clara's Associate Planner lacks primary project and consultant management functions in its job description and does not align with the District's Planner II position. To address this missing primary function, a match consisting of a functional hybrid with the Project Manager position would better align with the District's Planner II position as described in the respective job descriptions.

Span in Scope Hybrid Alignments

County of Sonoma (Park Planner II → Park Planner II/Senior Park Planner)

Sonoma County's Park Planner II was the benchmarked position to the District's Planner II and covers many of the same duties and responsibilities of a District Planner II. However, the District Planner II position includes work and management of more complex projects and a larger range of functions, including external project review and management of District-wide programs such as the Historic Resources and Signage Program. Sonoma County's Senior Park Planner position includes many responsibilities that are undertaken by District Planner IIs, including project management of complex projects and coordination with consultants and other agencies. Senior Park Planners are required to have three years of professional experience and to be licensed landscape architects, which exceeds the responsibilities of a District Planner II. Therefore, a hybrid of the Park Planner II and Senior Park Planner is most comparable to the role of a District Planner II.

City of Palo Alto (Associate Planner → Associate Planner/Senior Planner)

The City of Palo Alto's Associate Planner was the benchmarked position to the District's Planner II, but the District Planner II has a wider range of tasks as part of the primary functions. The City of Palo Alto's Senior Planner position includes many advanced tasks and responsibilities expected of District Planner IIs, including the full range of project management responsibilities and management of complex agency-wide programs that require extensive coordination between departments and consultants. The Senior Planner position requires five years of professional experience (or two years with a Master's degree), which is higher than the two years of professional experience required for District Planner IIs. However, although the Senior Planner position has higher expectations for professional experience, over half of the position's responsibilities overlap with the District Planner II position's responsibilities, including the advanced tasks mentioned above. This overlap indicates that the District Planner II position aligns more closely with a hybrid of the City of Palo Alto's Associate Planner and Senior Planner positions.

Benchmarked Positions That Do Not Match

Park Planner (County of Riverside)

The County of Riverside's Park Planner was the benchmarked position to the District's Planner II. However, the County of Riverside's Park Planner position lacks the project management and range of functions that District's Planner IIs perform. No position or hybrid of positions at the County of Riverside adequately reflect the breadth of work and responsibilities in the District's Planner II job description. For example, while the County of Riverside's Senior Park Planner role does perform project management duties, it also supervises staff and allocates staff resources which does not align with the District's Planner II job description. The County of Riverside's Urban/Regional Planner III and Environmental Planner III positions share some job functions with the District's Planner II but there is not enough overlap to result in a direct match or a hybrid match. For the above reasons, the comparison with the County of Riverside should be removed from consideration.

Assistant Planner (County of Sacramento)

The County of Sacramento's Assistant Planner was the benchmarked position to the District's Planner II. However, the County of Sacramento's Assistant Planner position lacks the project management and consultant management functions that the District's Planner II performs. The County's Assistant Planners "under general supervision, perform analytical planning and environmental work in the administration and development of community and general plans, zoning regulations, and environmental documents; explains the planning program, policies, local ordinances, and State and Federal regulations to the public." The County's position's duties include review of permit and development applications and education of the public on governmental functions, which is not a match for the District's Planner II job description. Functions that are aligned with the District's Planner II job description are performed at a less complex level. The County's Associate Planner position is next in the series and though it does include some project management functions, its primarily role is to supervise lower-level employees. It is therefore not a match for the District's Planner II position. No position or hybrid of positions at the County of Sacramento adequately reflect the breadth of work and responsibilities in the District's Planner II job description. For the above reasons, the comparison with the County of Sacramento should be removed from consideration.

INTERNAL CLASSIFICATION ALIGNMENT

Though this effort is focused on external comparators, because the project delivery process at the District is unique with close project collaboration and shared responsibilities, internal comparators are necessary to inform internal alignment, particularly between Planner II and CPM II positions and job functions. Planning staff recommend aligning the Planner II series with the CPM II series. Planner II series is most aligned with the CPM II series given the shared projects and responsibilities. Planner II job functions match 70-80% of the primary **project manager** job functions of the CPM II (see Appendix C – Annotated Planner II and CPM II Job Descriptions).

Planning and Engineering & Construction (E&C) project managers significantly overlap in primary job functions, because they share and manage the same large capital improvement and public access projects. Based on the 2015 FOSM findings, a restructuring occurred within the Planning Department, leading to the creation of an E&C department. Planning project managers initiate the projects and advance them through feasibility, preliminary or conceptual design, and environmental review before handing off the projects to E&C project managers to complete final design, permitting, and construction. The project complexity remains the same, but Planning's involvement is during an earlier project phase when the project scope and conceptual plan are being developed for Board of Director consideration and approval. This often entails development of multiple alternatives as well as greater public engagement and political

complexity, which lead to long project timelines. The technical work involved during this phase is complex and forms the foundation for E&C's work, e.g. boundary and topographic surveys, geotechnical studies, traffic studies, cultural resource studies, biological and vegetation studies, wetland delineations, etc. In addition, because of Planning's role with these initial technical studies and land use permitting parameters, Planning staff are critical subject matter experts that must remain on E&C's project team through the next phase of work, e.g. La Honda Parking Feasibility Study, Rancho and Purisima Multimodal Access Implementation, Hwy 35 Parking and Trail Crossing.

CONCLUSION

Planning department staff request Koff reevaluate the Planner II position to the benchmarked positions recommended in this memo based on the current Planner II job description. The analysis summarized above shows that the Planner II position is better aligned with different positions at the comparator agencies based on breadth of primary functions of the Planner II. Additionally, the Planner II and CPM II positions currently align in the District's Classification and Compensation Plan, and due to the significant overlap in primary job functions described in the job descriptions, Planning staff ask that this alignment remain, and the Human Resources department set the salary schedules accordingly. These changes should be made prior to the scheduled April 10th Board meeting.

Attachments:

- **A. – Recommended Benchmark Position Job Duty Comparison**
- **B. – Annotated Job Descriptions**
- **C. – Annotated Planner II and CPM II Job Descriptions**

CC: Susanna Chan, Assistant General Manager
Jane Mark, Planning Department Manager

Attachment A - Recommended Benchmark Position Job Duty Comparison

Agency	**Matched Position**	**Why do you disagree with the presented analysis?**	**What position, if any, do you think is a better match at the agency**	**Why do you believe the position(s) is a better match?**	**Additional comments regarding Benefits Detail and/or Total Compensation data.**
Santa Clara Valley Water District (Valley Water)	Assistant Environmental Planner II	Assistant Environmental Planner II's do not lead projects, but rather strictly work on CEQA.	Functional Hybrid: Assistant Environmental Planner II & Project Manager	A hybrid comparison of an Assistant Environmental Planner II and Project Manager is a better match to Midpen's Planner II work since District Planners work on CEQA and lead Midpen projects. Similar with Valley Water Project Managers, District Planner II's manage a project of moderate scope (many times more complex scopes with the assistance of a Senior Planner ex: LHC Feasibility Study and Rancho Multimodal), perform complex professional project management work as a team member for capital and operating projects and strategic issues within Midpen policies. Valley Water Project Managers participate in and review project initiation, planning, change management, control and close-out procedures. While District Planner II's lead (rather than participate) project initiation, planning change management, control and hand off procedures to E&C. The only scope of work District Planner's do not complete under Valley Water's Project Manager's job description is staff supervision. However, Planner II's do mentor Planner I's, interns, and oversee consultants. <u>Comparable responsibilities of a Project Manager (verbatim from job descriptions)</u>: • To manage part of a major project or a total project of moderate scope; to perform complex professional project management work as a team member for capital and operating projects and strategic issues within District policies; to participate in and review project initiation, planning, change management, control, and close-out procedures o District Planner II: *Participates in the scoping, planning, preliminary design and environmental review of capital improvement projects related to new trails, parking lots, or facilities.* o District Planner II: *Reviews routine to complex planning projects, which may include land use, management, policy, natural resources, regional, site and long range, and capital improvement planning, design and implementation.* o District Planner II: Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary.	Assistant Environmental Planner II: $112,091.20-143,416.00 annually Project Manager: $139,672.00 - $178,776.00 annually
Santa Clara Valley Open Space Authority	Associate Open Space Planner	Not Applicable –Associate Open Space Planner best matches with Planner II.			
County of Riverside	Park Planner	The County of Riverside's Park Planner position is not a match for Midpen's Planner II. Park Planner requires 1 year of experience, while Planner II requires 2 years of increasingly responsible experience. While the District Planner II is responsible for approximately half of duties associated with the County of Riverside Park Planner role, these	None found. Midpen's Planner II functions with responsibilities of Park Planner, Environmental Planner, Urban/Regional Planner, Project Manager. This is not one or two position		

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		duties represent a limited portion of the job responsibilities for Midpen's Planner II. Significant primary functions of the Planner II that are not part of Park Planner duties include: <u>Essential Functions and Abilities</u> • Participates in the scoping, planning, preliminary design and environmental review of capital improvement projects related to new trails, parking lots, or facilities. (Park Planner position responsible for design). • Conducts and/or assists with the California Environmental Quality Act (CEQA) environmental analysis of capital improvements, facilities, maintenance activities, and proposed new public uses on District lands. Reviews and prepares CEQA documents (e.g., Initial Studies, Categorical Exceptions, Negative Declarations) and sections of CEQA documents (e.g., Mitigated Negative Declarations and Environmental Impacts Reports) as part of the CEQA Coordination program. • Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and	hybrid that matches the responsibilities of Planner II.		

Attachment A - Recommended Benchmark Position Job Duty Comparison

Agency	Matched Position	Why do you disagree with the presented analysis?	What position, if any, do you think is a better match at the agency	Why do you believe the position(s) is a better match?	Additional comments regarding Benefits Detail and/or Total Compensation data.
		stakeholders; recommends adjustments as necessary. • Conduct research projects, evaluate alternatives, and make sound recommendations. • Interpret planning programs to the general public; identify and respond to issues and concerns of the public, other District staff, and other boards and commissions. • Provide support to the Historic Resources Coordination, Signage, CEQA and ADA Program. Other positions evaluated: *Environmental Planner* District Planners prepare CEQA documentation that is submitted to a County for review. A County functions as a lead agency and environmental planners review and process CEQA documentation. The Environmental Planner III's primary functions are CEQA program compliance focused, which does not align with Planner II job functions. *Urban/Regional Planner III* functions similar to a city planner, working with project applicants and facilitating the county's approval process. These planners may be involved in planning studies like the Planner II but lacks the primary project management functions. *Facilities Capital Project Manager II* has some overlap with the			

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Agency	Matched Position	Why do you disagree with the presented analysis?	What position, if any, do you think is a better match at the agency	Why do you believe the position(s) is a better match?	Additional comments regarding Benefits Detail and/or Total Compensation data.
		District Planner II's functions but is specific to architectural and engineering job functions.			
City of Walnut Creek	Associate Planner	In general, any of the planner series' described job functions at City of Walnut Creek do not align with District Planner job definitions. Many of the job duties described within Associate Planner generally align with Planner II job function, but does not reflect the comprehensive project management <u>primary functions</u> that are performed by Planner II, which is better captured by the Project Manager position. Planner II *manages* assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary. Associate Planner does not perform these functions. Associate Planner *may* administer contracts and oversee work of consultants. Planner IIs *develops contract scope of work, administers and monitors* contracts. Associate Planner is not expected to gather, analyze, and interpret environmental and land use data, whereas Planner II is expected to perform this function.	Functional Hybrid: Project Manager & Senior Planner	Associate Planner: 2 years' experience Senior Planner: 3 years' experience Project Manager: 4 years' experience The District lacks a centralized Project Management Office (PMO). The absence of a PMO results in planners managing all aspects of each of their individual projects. Planner II primary functions are project management focused and aligns with 50-70% of described job functions and job duties for Project Manager. <u>Comparable responsibilities of a Project Manager (verbatim from job descriptions)</u>: • Organizes, coordinates, and manages one or more major projects or programs in cooperation with other departments, outside agencies, contractors, work teams, and others as required. o District Planner II: *manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary* o District Planner II: *Researches and compiles information for the preparation of use and management plans for District preserves and other planning activities; conducts or directs field or background research; meets with District personnel, members of the public, neighbors, and other agency staff to solicit input and identify problems and opportunities; plans and conducts public workshops and resolves issues.* • Develops and monitors work plans, project goals, and schedules, including recommending and implementing changes. o District Planner II: *Participates in the scoping, planning, preliminary design and environmental review of capital improvement projects related to new trails, parking lots, or facilities.* o District Planner II: *manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary* • Analyzes and prepares written reports on program and project performance using project management methods and techniques; prepares and administers budgets, contracts and other administrative functions. o District Planner II: *Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings.* o District Planner II: *Researches, analyzes, and interprets environmental and land use data and trends; prepares written reports on various advance planning matters and elements of other agency general and land use plans.* o District Planner II: *manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary* • Serves as principal contact for assigned projects or program	Senior Planner: $119,847.26 - $145,033.98 Annually Top Monthly: $12,086.17 Project Manager: $123,520.28 - $150,134.66 Annually Top Monthly: $12,511.22

Attachment A - Recommended Benchmark Position Job Duty Comparison

Agency	Matched Position	Why do you disagree with the presented analysis?	What position, if any, do you think is a better match at the agency	Why do you believe the position(s) is a better match?	Additional comments regarding Benefits Detail and/or Total Compensation data.
				○ District Planner II: *Researches and gathers information regarding historical and cultural resources on District properties to support the Historic Resources Coordination program.* • Manages vendor selection process and administers vendor contracts as necessary; writes grant applications, requests for proposals, and contracts. ○ District Planner II: *Develops and solicits consultant requests for proposal for professional services; evaluates proposals and recommends award of contract; administers contracts after award.* ○ District Planer II: *Develops, administers, and monitors planning and engineering consultant contracts; reviews and manages consultant work and compares tasks completed against invoice amounts to authorize payment.* ○ District Planner II: *Participates in the preparation and development of grant applications; assists Grants Program staff with administering grants, monitoring budgets, and submitting reimbursement requests and audit material; addresses project inquiries from granting agencies; prepares necessary grant-supporting reports.* Due to the Planner IIs primary function duties as project managers, these primary tasks are more comprehensively reflected by the combination of Project Manager and Senior Planner positions. <u>Comparable responsibilities of a Senior Planner (verbatim from job descriptions)</u>: • Participate in budget preparation and administration; prepare cost estimates for budget recommendations; monitor and control expenditures. ○ District Planner II: *Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary.* • Administers contracts and oversees the work of consultants. ○ District Planner II: *Develops and solicits consultant requests for proposal for professional services; evaluates proposals and recommends award of contract; administers contracts after award.* ○ District Planner II: *Develops, administers, and monitors planning and engineering consultant contracts; reviews and manages consultant work and compares tasks completed against invoice amounts to authorize payment.* ○ District Planner II: *Confers with and advises design and engineering professionals, building and construction professionals, environmental planners and professionals, attorneys, and the general public regarding District development policies and standards; provides and clarifies information relative to land use, environmental compliance, ADA compliance, historic preservation, capital improvement, and other issues.* • Gather, analyze, and interpret data relating to local environmental and land use issues; prepare comprehensive reports and recommend courses of action. ○ District Planner II: *Researches, analyzes, and interprets environmental and land use data and trends; prepares written reports on various advance planning matters and elements of other agency general and land use plans.*	

Attachment A - Recommended Benchmark Position Job Duty Comparison

Agency	Matched Position	Why do you disagree with the presented analysis?	What position, if any, do you think is a better match at the agency	Why do you believe the position(s) is a better match?	Additional comments regarding Benefits Detail and/or Total Compensation data.
County of Santa Cruz	Park Planner II	The Park Planner II does not lead complex planning projects, nor are they expected to coordinate with external agencies and make presentations to decision making bodies. The District's Planner II position is expected to review *routine to complex* planning projects, *manage* assigned projects and tasks and *provide interpretations* of relevant zoning/local codes and environmental and historic preservation regulations, laws, policies, and guidelines. The Park Planner II has limited primary functions that relate solely to park development and management. District Planner II primary functions extend beyond management of open space preserves, including monitoring and commenting on external projects, managing historic resource and signage programs that require extensive inter-agency coordination, and conduct/assist with CEQA environmental analysis to prepare CEQA documents. The Park Planner II also requires fewer years of professional experience (one year) than the Planner II position at the District (two years).	Park Planner III	The Park Planner III position at the County of Santa Cruz leads complex planning projects and is expected to lead coordination efforts across multiple organizations. This position also makes presentations to the public, boards, commissions, and committees, which is completed by those in the District's Planner II position. In addition, the Park Planner III is expected to evaluate design proposals and construction documents prepared by others. A Planner II at the District completes this work as well as reviews all technical studies completed by subject matter experts and coordinates with other departments. Park Planner III has the same experience and education requirements as a District Planner II. <u>Comparable responsibilities of a Park Planner III (verbatim from job descriptions)</u>: • Present major planning studies analyses and reports to boards, commissions and committees. o District Planner II: *Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings.* o District Planner IIs also present these reports/finding to the Board of Directors, Committees, and other public bodies. • Complete complex assignments, determine alternative choices and make recommendations. o District Planner II: *Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary.* o District Planner II: *Reviews routine to complex planning projects, which may include land use, management, policy, natural resources, regional, site and long range, and capital improvement planning, design and implementation.* o District Planner II: *Compiles information for a variety of studies and reports; researches and reviews previous entitlements and records; develops recommendations and prepares written reports on various planning matters.* • Prepare clear and concise administrative and technical reports, resolutions, permit applications and environmental documents associated with park development, oversee the park master process from consultant selection to final approval. o District Planner II: *Compiles information for a variety of studies and reports; researches and reviews previous entitlements and records; develops recommendations and prepares written reports on various planning matters.* • Evaluate design proposals and construction documents prepared by others. o District Planner II: *Develops, administers, and monitors planning and engineering consultant contracts; reviews and manages consultant work* o District Planner II: *Confers with and advises design and engineering professionals, building and construction professionals, environmental planners and professionals, attorneys, and the general public regarding District development policies and standards; provides and clarifies information relative to land use, environmental compliance, ADA compliance, historic preservation, capital improvement, and other issues.* • Provide leadership to team efforts, including public groups.	Park Planner II: $81,348.80 - $102,960.00 Annually Top Monthly: $8,580.00 Park Planner III: $89,668.80 - $113,505.60 Annually Top Monthly: $9,459.00

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Agency	Matched Position	Why do you disagree with the presented analysis?	What position, if any, do you think is a better match at the agency	Why do you believe the position(s) is a better match?	Additional comments regarding Benefits Detail and/or Total Compensation data.
				○ District Planner II: *Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary.* ○ District Planner II: *Conducts briefings and presents materials, project information, and recommendations at public meetings.*	
City of Palo Alto	Associate Planner	The Associate Planner position has similar responsibilities to a District Planner II, however, the District Planner II has a wider range of tasks as part of the primary functions, including management of the District's Historic Resource Program and Signage Program. The Associate Planner does not assign and monitor work of subordinate and/or temporary personnel, however, District Planner II positions are involved in assigning work and training Planning Interns in limited capacities. The Associate Planner position does not manage projects and consultants at the same level as District Planner IIs, who lead the project team from scoping, budget, and contract development through project completion.	Span in Scope Hybrid with Associate Planner and Senior Planner	The Senior Planner position includes many advanced tasks and responsibilities expected of District Planner IIs, including the full range of project management responsibilities and management of complex District-wide programs that require extensive coordination between departments and consultants. The Senior Planner classification also states that this "*position <u>may</u> act as project manager on assigned projects, including coordination of the work of other professional and technical personnel*" whereas this is the expectation of District Planner IIs. The Senior Planner position requires five years of professional experience (or two years with a Master's Degree), which is higher than the two years of professional experience required for District Planner IIs. Although the Senior Planner position has higher expectations for professional experience, over half of the position responsibilities overlap with District Planner IIs, including the advanced tasks mentioned above, which indicates that District Planner II position aligns more closely with a hybrid of the City of Palo Alto Associate Planner and Senior Planner roles. <u>Comparable responsibilities of a Senior Planner (verbatim from job descriptions)</u>: • Supervises preparation of environmental impact reports on projects submitted for City approval. ○ District Planner II: *Conducts and/or assists with the California Environmental Quality Act (CEQA) environmental analysis of capital improvements, facilities, maintenance activities, and proposed new public uses on District lands. Reviews and prepares CEQA documents (e.g., Initial Studies, Categorical Exceptions, Negative Declarations) and sections of CEQA documents (e.g., Mitigated Negative Declarations and Environmental Impacts Reports) as part of the CEQA Coordination program.* • Prepares reports, including coordinating the work of other staff members, on special planning or transportation studies for the Architectural Review Board, Historic Resources Board, Planning Commission, City Council, appointed committees and other City staff. ○ District Planner II: *Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings.* • Coordinates and monitors the work of planning, environmental and transportation consultants. ○ District Planner II: *Develops, administers, and monitors planning and engineering consultant contracts; reviews and manages consultant work and compares tasks completed against invoice amounts to authorize payment.* • Coordinates and monitors implementation of the City's Historic Preservation Program. ○ District Planner II: *Researches and gathers information regarding historical and cultural resources on District properties to support the Historic Resources Coordination program.* • Makes public presentations before appointed boards, commissions, committees, and the City Council.	Associate Planner: $100,422.40 - $123,281.60 Annually Top Monthly: $10,273.47 Senior Planner: $123,947.20 - $152,193.60 Annually Top Monthly: $12,682.80

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Agency	Matched Position	Why do you disagree with the presented analysis?	What position, if any, do you think is a better match at the agency	Why do you believe the position(s) is a better match?	Additional comments regarding Benefits Detail and/or Total Compensation data.
				○ District Planner II: *Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings.* • As needed, assigns and monitors work of technical, subordinate professional and temporary personnel who may assist in the above tasks. ○ District Planner IIs work closely with Planning Interns to assign work and provide limited training in planning tasks and responsibilities.	
County of Sonoma	Park Planner II	The Park Planner II position covers many of the same duties and responsibilities of a District Planner II, however, the District Planner II position includes work and management of more complex projects and a larger range of primary functions, including external project review and commenting as well as management of District-wide programs such as the Historic Resource Program and Sign Program. The experience required for a Park Planner II is at or potentially below the requirements for a District Planner II. The Park Planner II position typically requires two years of professional experience in a related field, however, "*any combination of training and experience which would likely provide for possession of stated knowledge and abilities*" would be sufficient.	Span in Scope Hybrid with Park Planner II and Senior Park Planner	The Senior Park Planner position includes many responsibilities that are undertaken by District Planner IIs, including project management of complex projects and coordination with consultants and other agencies. Senior Park Planners are expected to be licensed landscape architects and act as subject matter experts, which exceeds the responsibilities of a District Planner II, so a hybrid of the Park Planner II and Senior Park Planner is most comparable to the role of a District Planner II. Senior Park Planners typically have three years of professional experience (while District Planner IIs require two years). However, the Senior Park Planner description states that "*any combination of education, training and experience, which would likely provide for possession of stated knowledge and abilities*" would be sufficient. <u>Comparable responsibilities of a Senior Park Planner (verbatim from job descriptions):</u> • Conducts short-term and long-range planning for the regional parks system; makes preliminary field investigations of proposed park, recreation or historic sites to assess suitability and potential usage ○ District Planner II: *Participates in the scoping, planning, preliminary design and environmental review of capital improvement projects related to new trails, parking lots, or facilities. Reviews routine to complex planning projects, which may include land use, management, policy, natural resources, regional, site and long range, and capital improvement planning, design and implementation.* ○ District Planner II: *Researches and gathers information regarding historical and cultural resources on District properties to support the Historic Resources Coordination program.* • Reviews and interprets aerial photographs and topographic maps ○ District Planner II: *Compiles information for a variety of studies and reports; researches and reviews previous entitlements and records; develops recommendations and prepares written reports on various planning matters.* • Prepares, develops and reviews park development plans, environmental documents, design studies, preliminary plans, construction drawings, specifications, cost estimates, documents for public bid or construction, contracts, and associated documents and regulatory permits for park projects. ○ District Planner II: *Conducts and/or assists with the California Environmental Quality Act (CEQA) environmental analysis of capital improvements, facilities, maintenance activities, and proposed new public uses on District lands. Reviews and prepares CEQA documents.* ○ District Planner II: *Confers with and advises design and engineering professionals, building and construction professionals, environmental planners and professionals, attorneys, and the general public regarding District development policies and standards; provides and clarifies information relative to land use, environmental*	Park Planner II: $94,483.92 - $114,854.21 Annually Top Monthly: $9,571.18 Senior Park Planner: $112,266.18 - $136,435.03 Annually Top Monthly: $11,369.59

Attachment A - Recommended Benchmark Position Job Duty Comparison

Agency	Matched Position	Why do you disagree with the presented analysis?	What position, if any, do you think is a better match at the agency	Why do you believe the position(s) is a better match?	Additional comments regarding Benefits Detail and/or Total Compensation data.
				compliance, ADA compliance, historic preservation, capital improvement, and other issues. • Reviews the work of consultants engaged in the preparation of site and facility development plans, environmental documents, landscape plans, grading plans, design details, cost estimates construction drawings, and specifications. o District Planner II: *Confers with and advises design and engineering professionals, building and construction professionals, environmental planners and professionals, attorneys, and the general public regarding District development policies and standards; provides and clarifies information relative to land use, environmental compliance, ADA compliance, historic preservation, capital improvement, and other issues.* • Spot-checks landscape architectural plans in process; consults with staff regarding problems in the development and execution of park projects; o District Planner II: *Confers with and advises design and engineering professionals, building and construction professionals, environmental planners and professionals, attorneys, and the general public regarding District development policies and standards; provides and clarifies information relative to land use, environmental compliance, ADA compliance, historic preservation, capital improvement, and other issues.* • Prepares and administers grant applications and programs for park acquisition and development; conducts public meetings to present public information and elicit responses; prepares project descriptions and renderings for public presentations; makes presentations to the Board of Supervisors and other public bodies. o District Planner II: *Participates in the preparation and development of grant applications; assists Grants Program staff with administering grants, monitoring budgets, and submitting reimbursement requests and audit material; addresses project inquiries from granting agencies; prepares necessary grant-supporting reports.* o District Planner II: *Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings.* • Participates with public groups and other County departments and public agencies in preparing long-range and County-wide plans and special studies. o District Planner II: *Researches and compiles information for the preparation of use and management plans for District preserves and other planning activities; conducts or directs field or background research; meets with District personnel, members of the public, neighbors, and other agency staff to solicit input and identify problems and opportunities; plans and conducts public workshops and resolves issues.* • Coordinates park improvement work with other phases of development projects. o District Planner II: *Researches and compiles information for the preparation of use and management plans for District preserves and other planning activities; conducts or directs field or background research; meets with District personnel, members of the public, neighbors, and other agency staff to solicit input and identify problems and opportunities; plans and conducts public workshops and resolves issues.*	

Attachment A - Recommended Benchmark Position Job Duty Comparison

Agency	Matched Position	Why do you disagree with the presented analysis?	What position, if any, do you think is a better match at the agency	Why do you believe the position(s) is a better match?	Additional comments regarding Benefits Detail and/or Total Compensation data.
County of Santa Clara	Associate Planner	The Associate Planner does have many functions that line up with the District Planner II, including the development and management of planning and feasibility studies, conducting research and preparing recommendations. Both roles include the preparation of environmental CEQA documents and outreach to external groups. The Associate Planner does not conduct project management duties in the same way that District Planner II's do. The description and tasks associated with the Associate Planner are more appropriate to a counter planner that processes permit and development applications. This role also does not have any contract administration or consultant management duties. Because these primary functions are not included in the job description for the Associate Planner, and functional hybrid is proposed between the Associate Planner and Project Manager positions.	Functional Hybrid with Associate Planner and Project Manager Positions	The County of Santa Clara also has a Project Manager position that covers many of the same functions as the District Planner II. The Associate Planner position has the same professional work experience requirements (two years) as the District Planner II position, while the Project Manager position requires three years of full-time project management-related professional experience. The Santa Clara positions and professional experience requirements do not fully overlap with the District Planner II position, therefore a hybrid between the Associate Planner and Project Manager is recommended. <u>Comparable responsibilities of a Project Manager (verbatim from job descriptions)</u>: • Plans and oversees projects of high complexity to completion. o District Planner II: *Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary.* o District Planner II: *Reviews routine to complex planning projects, which may include land use, management, policy, natural resources, regional, site and long range, and capital improvement planning, design and implementation.* • Prepares, monitors, and manages project budgets o District Planner II: *Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary.* • Works with project leadership and stakeholders to identify and establish project goals, scope, objectives, priorities, timelines, schedules, resources, and deliverables o District Planner II: *Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary.* o District Planner II: *Researches and compiles information for the preparation of use and management plans for District preserves and other planning activities; conducts or directs field or background research; meets with District personnel, members of the public, neighbors, and other agency staff to solicit input and identify problems and opportunities; plans and conducts public workshops and resolves issues.* • Manages the analysis of procedures and systems to assess and improve the operational execution of special projects o District Planner II: *Researches, analyzes, and interprets environmental and land use data and trends; prepares written reports on various advance planning matters and elements of other agency general and land use plans.* o District Planner II: *Researches and gathers information regarding historical and cultural resources on District properties to support the Historic Resources Coordination program.* o District Planner II: *Performs work to support the District's signage program; serves on District sign committee; prepares or modifies new field signs; prepares new signage artwork; conducts field research; improves and maintains District sign manual and sign inventory; researches appropriate sign locations; coordinates with field staff regarding installation; places orders for new signage with vendors.* • Advises on project feasibility and recommends solutions	Associate Planner: $95,869.28 - $116,047.36 Annually Top Monthly: 9,670.61 Project Manager $122,545.28 - $148,973.76 Annually Top Monthly: $12,414.48

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				○ District Planner II: *Compiles information for a variety of studies and reports; researches and reviews previous entitlements and records; develops recommendations and prepares written reports on various planning matters.* • Formulates strategies and establishes priorities to achieve objectives ○ District Planner II: *Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary.* • Monitors and creates, as needed, tracking tools, schedules, reports, procedures, and processes to support successful project implementation ○ District Planner II: *Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary.* • Identifies and defines system resources, develops project plans, budgets, and work schedules for the implementation of new systems and/or application of enhancements ○ District Planner II: *Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary.* ○ District Planner II: *Researches, analyzes, and interprets environmental and land use data and trends; prepares written reports on various advance planning matters and elements of other agency general and land use plans.* ○ District Planner II: *Researches and compiles information for the preparation of use and management plans for District preserves and other planning activities; conducts or directs field or background research; meets with District personnel, members of the public, neighbors, and other agency staff to solicit input and identify problems and opportunities; plans and conducts public workshops and resolves issues.* • Monitors and evaluates the performance of vendors and ensures that contracts and agreements are met and problems are dealt with on a timely basis ○ District Planner II: *Develops, administers, and monitors planning and engineering consultant contracts; reviews and manages consultant work and compares tasks completed against invoice amounts to authorize payment.* • Evaluates and makes recommendations relating to workflow and staffing patterns and assists in the establishment of performance standards and workload measures ○ District Planner II: *Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary.* • Participates in meetings and serves as liaison with County departments and stakeholders, and represents the project in contacts with the public and private agencies and concerned community groups and organizations; ○ District Planner II: *Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings.* ○ District Planner II: *Researches and compiles information for the preparation of use and management plans for District preserves and other planning activities; conducts or directs field or background research; meets with District personnel, members of the public, neighbors, and other agency staff to solicit input and identify problems and opportunities; plans and conducts public workshops and resolves issues.*	

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				• Assists with the development and management of contracts, data sharing agreements, and other legal, regulatory, and compliance activities, in coordination with County Counsel and other County partners. o District Planner II: *Develops and solicits consultant requests for proposal for professional services; evaluates proposals and recommends award of contract; administers contracts after award.* o District Planner II: *Develops, administers, and monitors planning and engineering consultant contracts; reviews and manages consultant work and compares tasks completed against invoice amounts to authorize payment.* o District Planner II: *Participates in the preparation and development of grant applications; assists Grants Program staff with administering grants, monitoring budgets, and submitting reimbursement requests and audit material; addresses project inquiries from granting agencies; prepares necessary grant-supporting reports.* • Conducts special studies and investigations in assigned program area o District Planner II: *Develops, administers, and monitors planning and engineering consultant contracts; reviews and manages consultant work and compares tasks completed against invoice amounts to authorize payment.* o District Planner II: *Reviews and provides interpretations of relevant zoning and other local codes and regulations for project applicability; provides interpretations of environmental and historic preservation regulations, laws, policies, and guidelines.* o District Planner II: *Researches, analyzes, and interprets environmental and land use data and trends; prepares written reports on various advance planning matters and elements of other agency general and land use plans.* • Prepares and presents project status updates to internal and/or external partners and stakeholders, including detailed status reports and correspondences, as requested o District Planner II: *Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings.* • Assists with determining funding needs and obtaining external funding when necessary, through grants and/or contracts o District Planner II: *Participates in the preparation and development of grant applications; assists Grants Program staff with administering grants, monitoring budgets, and submitting reimbursement requests and audit material; addresses project inquiries from granting agencies; prepares necessary grant-supporting reports.* o District Planner II: *Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary.* • Utilizes established project standards and procedures, and contributes to the development and continued improvement of project management tools o District Planner II: *Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary.* o District Planner II: *Attends meetings, conferences, workshops, and training sessions; attends and participates in professional group meetings; stays abreast of new trends*	

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				and innovations in the field of planning and other types of public services as they relate to the area of assignment.	
East Bay Regional Park District	Planner	The Planner only requires one year of experience and does not have a project management component of their job description. The areas of knowledge do not include natural resource knowledge, resource management, site planning, project management, research methods, project budget preparation and management, principles of mathematics, record keeping, techniques for customer service, and field procedures that are all listed in District Planner II knowledge requirements. While the District Planner II matches the majority of the skills and the job requirements, there are much greater requirements for the Planner II that are better encompassed by the EBRPD Senior Planner.	More experienced role: Senior Planner	The Senior Planner role at EBRPD is a much more comprehensive planning role that incorporates complex project management, contract management and includes a greater variety of project work including regional trails, which is a common component of District Planner II work. The EBRPD Senior Planner *serves as a liaison* to outside agencies, trail users and other community groups. The District Planner II is expected to *effectively represent the department and the District* in meetings with governmental agencies, community groups, and various businesses, professional, and regulatory organizations and individuals including in the format of public workshops with the goals to solicit input and identify problems and opportunities, and resolving issues. The EBRPD Senior Planner is much more aligned with the District Planner II in required areas of knowledge than is the EBRPD Planner, though the District Planner II has more required knowledge. The EBRPD Senior Planner is expected to have knowledge of interdisciplinary topics such as environmental evaluation procedures and laws, and trail planning, design concepts and trail maintenance. The District Planner II is expected to have interdisciplinary knowledge of one or more other disciplines including urban and regional planning, historic preservation, biology, earth sciences, ecology, etc. as well as concepts of ecology, flora, fauna, geological, aquatic, archaeological, and cultural resources of California. Additionally, the District Planner II is expected to have knowledge of basic concepts of architecture, landscape architecture, and engineering as they relate to assigned projects. <u>Comparable responsibilities of a Senior Planner (verbatim from job descriptions)</u>: • Reviews assigned projects and develops project methods and procedures o District Planner II: *Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary.* • Leads project teams, working collaboratively and professionally with team members and stakeholders [Planning or Environmental Review, Regional Trails] o District Planner II: *Researches and compiles information for the preparation of use and management plans for District preserves and other planning activities; conducts or directs field or background research; meets with District personnel, members of the public, neighbors, and other agency staff to solicit input and identify problems and opportunities; plans and conducts public workshops and resolves issues.* • Manages consultants in the preparation of studies, plans, designs and cost estimates for projects o District Planner II: *Confers with and advises design and engineering professionals, building and construction professionals, environmental planners and professionals, attorneys, and the general public regarding District development policies and standards; provides and clarifies information relative to land use, environmental compliance, ADA compliance, historic preservation, capital improvement, and other issues.* o District Planner II: *Develops, administers, and monitors planning and engineering consultant contracts; reviews and manages consultant work and compares tasks completed against invoice amounts to authorize payment.* • Independently evaluates the environmental impacts of capital and maintenance projects	Associate Planner $101,010 - $114,309 Annually Top Monthly: $9,525.75 Senior Planner $118,955.16 - $134,555.16 Annually Top Monthly: $11,212.93

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				○ District Planner II: *Conducts and/or assists with the California Environmental Quality Act (CEQA) environmental analysis of capital improvements, facilities, maintenance activities, and proposed new public uses on District lands. Reviews and prepares CEQA documents (e.g., Initial Studies, Categorical Exceptions, Negative Declarations) and sections of CEQA documents (e.g., Mitigated Negative Declarations and Environmental Impacts Reports) as part of the CEQA Coordination program.* • Coordinates with resource regulatory agencies ○ District Planner II: *Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary.* • Represents the Park District interests and supports Park District objectives in a wide range of community, environmental and public forums [Planning or Environmental Review, Regional Trails] ○ District Planner II: *Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings.* ○ District Planner II: *Researches and compiles information for the preparation of use and management plans for District preserves and other planning activities; conducts or directs field or background research; meets with District personnel, members of the public, neighbors, and other agency staff to solicit input and identify problems and opportunities; plans and conducts public workshops and resolves issues.* • Assists in the preparation of grant applications related to land use plans and capital projects [Planning or Environmental Review, Regional Trails] ○ District Planner II: *Participates in the preparation and development of grant applications; assists Grants Program staff with administering grants, monitoring budgets, and submitting reimbursement requests and audit material; addresses project inquiries from granting agencies; prepares necessary grant-supporting reports*. • Gathers, analyzes, and interprets data relating to local planning action referrals, general plans, specific plans, development proposals and environmental policy documents ○ District Planner II: *Reviews and provides interpretations of relevant zoning and other local codes and regulations for project applicability; provides interpretations of environmental and historic preservation regulations, laws, policies, and guidelines.* • Conducts site visits and field investigations as required [Planning or Environmental Review, Regional Trails] ○ District Planner II: *Researches and compiles information for the preparation of use and management plans for District preserves and other planning activities; conducts or directs field or background research; meets with District personnel, members of the public, neighbors, and other agency staff to solicit input and identify problems and opportunities; plans and conducts public workshops and resolves issues.* • Makes recommendations on land use planning issues ○ District Planner II: *Compiles information for a variety of studies and reports; researches and reviews previous entitlements and records; develops recommendations and prepares written reports on various planning matters.*	

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				• Conducts research on park resources, prepares comprehensive reports, and recommends courses of action o District Planner II: *Compiles information for a variety of studies and reports; researches and reviews previous entitlements and records; develops recommendations and prepares written reports on various planning matters.* o District Planner II: *Researches, analyzes, and interprets environmental and land use data and trends; prepares written reports on various advance planning matters and elements of other agency general and land use plans.* • Selects and monitors outside consultants [Planning or Environmental Review, Regional Trails] o District Planner II: *Develops and solicits consultant requests for proposal for professional services; evaluates proposals and recommends award of contract; administers contracts after award.* o District Planner II: *Develops, administers, and monitors planning and engineering consultant contracts; reviews and manages consultant work and compares tasks completed against invoice amounts to authorize payment.* • Prepares environmental impact documents and land use plans o District Planner II: *Conducts and/or assists with the California Environmental Quality Act (CEQA) environmental analysis of capital improvements, facilities, maintenance activities, and proposed new public uses on District lands. Reviews and prepares CEQA documents (e.g., Initial Studies, Categorical Exceptions, Negative Declarations) and sections of CEQA documents (e.g., Mitigated Negative Declarations and Environmental Impacts Reports) as part of the CEQA Coordination program.* o District Planner II: *Participates in the scoping, planning, preliminary design and environmental review of capital improvement projects related to new trails, parking lots, or facilities.* • Provides follow-up coordination in the design and construction phase of land use plans o District Planner II: *Confers with and advises design and engineering professionals, building and construction professionals, environmental planners and professionals, attorneys, and the general public regarding District development policies and standards; provides and clarifies information relative to land use, environmental compliance, ADA compliance, historic preservation, capital improvement, and other issues.* • Presents Park District positions in written responses and at public hearings o District Planner II: *Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings.* o District Planner II: *Prepares staff reports for use and management plan amendments, feasibility and planning studies, contract solicitation and authorization, permit applications, and grant proposals.* • Communicates on an ongoing basis with developers and public agencies o District Planner II: *Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary.*	

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				• Prepares long range plans, special reports and studies, correspondence, cost estimates, working maps and displays as required o District Planner II: *Researches and compiles information for the preparation of use and management plans for District preserves and other planning activities; conducts or directs field or background research; meets with District personnel, members of the public, neighbors, and other agency staff to solicit input and identify problems and opportunities; plans and conducts public workshops and resolves issues.* o District Planner II: *Prepares staff reports for use and management plan amendments, feasibility and planning studies, contract solicitation and authorization, permit applications, and grant proposals.* o District Planner II: *Produces maps, graphics, charts, public notices and other supporting information for assigned projects and planning activities, including those for presentations, meetings, reports and studies.* • Conducts varied trail related planning projects, including feasibility studies and local and regional trail planning efforts o District Planner II: *Participates in the scoping, planning, preliminary design and environmental review of capital improvement projects related to new trails, parking lots, or facilities.* • Manages projects through construction utilizing staff and/or outside contractors o District Planner II: *Confers with and advises design and engineering professionals, building and construction professionals, environmental planners and professionals, attorneys, and the general public regarding District development policies and standards; provides and clarifies information relative to land use, environmental compliance, ADA compliance, historic preservation, capital improvement, and other issues.* • Serves as liaison to outside agencies, trail users and other community groups o District Planner II: *Researches and compiles information for the preparation of use and management plans for District preserves and other planning activities; conducts or directs field or background research; meets with District personnel, members of the public, neighbors, and other agency staff to solicit input and identify problems and opportunities; plans and conducts public workshops and resolves issues.* • Gathers, analyzes, and interprets data relating to local trail related planning actions, general plans, specific plans, development proposals and environmental policy documents, as assigned and reviews and comments to ensure the Park District's interests are protected o District Planner II: *Reviews and provides interpretations of relevant zoning and other local codes and regulations for project applicability; provides interpretations of environmental and historic preservation regulations, laws, policies, and guidelines.* • Analyzes data, creates maps, and communicates ideas and/or concerns using Global Positioning System (GPS) and Geographic Information System (GIS) o District Planner II: *Utilizes computer-based or other systems such as GIS or GPS for management and analysis of data regarding District lands, facilities, natural resources and activities.* • Ensures trail projects to be owned, operated or managed by the Park District, are designed consistent with Park District standards o District Planner II: *Participates in the scoping, planning, preliminary design and environmental review of capital improvement projects related to new trails, parking lots, or facilities.*	

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				○ District Planner II: *Confers with and advises design and engineering professionals, building and construction professionals, environmental planners and professionals, attorneys, and the general public regarding District development policies and standards; provides and clarifies information relative to land use, environmental compliance, ADA compliance, historic preservation, capital improvement, and other issues.*	
County of Sacramento	Assistant Planner	There are no requirements for work experience if candidates have a 4-year degree in a relevant field. Many of the tasks are more related to urban planning and data analysis and there is no project management, contract management, consultant management component. <u>Comparable responsibilities of an Assistant Planner (verbatim from job descriptions):</u> • Reviews proposed development or public infrastructure project plans and/or applications for variance and other development permits and approvals ○ District Planner II: No Matching function • Researches, compiles, analyzes, and interprets information and data in the preparation of environmental documentation and special reports. ○ District Planner II: *Researches and compiles information for the preparation of use and management plans for District*	No Match	The City of Sacramento has no directly comparable position. The Assistant Planner is an entry level planning job with no required experience and the next more experienced planning position (Associate Planner) only requires one year of experience, but is mainly focused on supervision. Both positions are more oriented to permitting proponents projects and are much more urban focused. <u>Comparable responsibilities of an Associate Planner (verbatim from job descriptions)</u>: • Plans, prioritizes, assigns, supervises, reviews and participates in the work of staff responsible for the preparation and administration of general plan amendments, subdivision, land use and zoning regulations, community plans, planning staff reports and environmental documents. ○ District Planner II: No matching function • Works with employees to correct deficiencies; recommends and/or implements discipline and termination procedures ○ District Planner II: No matching function • Provides and/or coordinates staff training in accordance with established policies and procedures. ○ District Planner II: No matching function • Coordinates and reviews the work plan for assigned functions, services, and activities; assigns work activities and projects; monitors work flow; reviews and evaluates work products, methods and procedures; meets with staff to identify and resolve problems; ensures work is performed accurately and that timelines are met; ensures compliance with established policies, procedures, and related regulations. ○ District Planner II: *Confers with and advises design and engineering professionals, building and construction professionals, environmental planners and professionals, attorneys, and the general public regarding District development policies and standards; provides and clarifies information relative to land use, environmental compliance, ADA compliance, historic preservation, capital improvement, and other issues.* ○ District Planner II: *Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary.* • Performs more technical and complex tasks of the work unit, which may include such duties as selecting, managing and administering the services of consultants; reviewing work products for technical accuracy and compliance with local, State and Federal regulations, overseeing budget and financial records. ○ District Planner II: *Develops, administers, and monitors planning and engineering consultant contracts; reviews and manages consultant work and compares tasks completed against invoice amounts to authorize payment.*	

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		preserves and other planning activities; conducts or directs field or background research; meets with District personnel, members of the public, neighbors, and other agency staff to solicit input and identify problems and opportunities; plans and conducts public workshops and resolves issues. • Presents proposals and recommendations to local planning committees, councils, public agencies, and community groups. o District Planner II: *Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings.*			

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		o District Planner II: *Researches and compiles information for the preparation of use and management plans for District preserves and other planning activities; conducts or directs field or background research; meets with District personnel, members of the public, neighbors, and other agency staff to solicit input and identify problems and opportunities; plans and conducts public workshops and resolves issues.* • No Project Management duties o District Planner II: *Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders;*			

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		recommends adjustments as necessary. • No contract or consultant management duties o District Planner II: *Develops, administers, and monitors planning and engineering consultant contracts; reviews and manages consultant work and compares tasks completed against invoice amounts to authorize payment.*			
County of San Mateo	Planner II	The County's Planner II lacks the primary project management functions. This position functions similar to a planner at a city, and process applicant's projects through the county's approval process, instead of managing the agency's capital projects, that the District Planner II performs.	Functional Hybrid Planner II-Capital Projects Manager I	Planner II requires: 2 years' experience CPM 1 Requires: 3 years' experience Due to the County's Planner II position's lack of primary project management function, the District's Planner II position is best represented by a hybrid with Captial Project Manager I, which fills that gap. <u>Comparable responsibilities of a Capital Projects Manager I (verbatim from job descriptions)</u>: • Manage the consultant, contractor and vendor selection process, including the solicitation and evaluation of bids, coordinating requests for proposals and obtaining Board of Supervisors approvals. o District Planner II*: Develops and solicits consultant requests for proposal for professional services; evaluates proposals and recommends award of contract; administers contracts after award.* • Provide guidance and coordination of work to consultants and contractors related to project criteria, regulations, codes, standards and schedules. o District Planner II: *Develops, administers, and monitors planning and engineering consultant contracts; reviews and manages consultant work and compares tasks completed against invoice amounts to authorize payment.* o District Planner II: *Reviews and provides interpretations of relevant zoning and other local codes and regulations for project applicability; provides interpretations of environmental and historic preservation regulations, laws, policies, and guidelines.*	Capital Projects Manager 1: $106,371.20 - $132,974.40 Annually Top Monthly: $11,081.20 Planner II: $88,899.20 - $111,113.60 Annually Top Monthly: $9,259.47 Monthly

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				• Communicate orally and in writing with county officials, other county departments consultants, contractors, architects, engineers, outside agencies and the public on assigned projects. o District Planner II: *Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings.* o District Planner II: *Confers with and advises design and engineering professionals, building and construction professionals, environmental planners and professionals, attorneys, and the general public regarding District development policies and standards; provides and clarifies information relative to land use, environmental compliance, ADA compliance, historic preservation, capital improvement, and other issues.* • Keep projects within approved budget, and on their approved schedule; analyze claims, project costs, verify expenses, obtain fiscal approval when required and approve contractor/ consultant payment requests. o District Planner II: *Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary.* o District Planner II: *Develops, administers, and monitors planning and engineering consultant contracts; reviews and manages consultant work and compares tasks completed against invoice amounts to authorize payment.* • Assure that the pre-architectural work and conceptual designs meet the County's needs and are compatible with master plans. o District Planner II: *Confers with and advises design and engineering professionals, building and construction professionals, environmental planners and professionals, attorneys, and the general public regarding District development policies and standards; provides and clarifies information relative to land use, environmental compliance, ADA compliance, historic preservation, capital improvement, and other issues.* • Prepare correspondence, communication and reports for the Board of Supervisors. o District Planner II: *Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings.* • Act as coordinating liaison with county officials, consultants, contractors, architects, engineers, outside agencies and the public regarding capital improvement projects. o District Planner II: *Confers with and advises design and engineering professionals, building and construction professionals, environmental planners and professionals, attorneys, and the general public regarding District development policies and standards; provides and clarifies information relative to land use, environmental compliance, ADA compliance, historic preservation, capital improvement, and other issues.* o District Planner II: *Monitors and conducts external project reviews to identify potential issues or development proposals of private or public lands near or adjacent to open space preserves that may impact District interests and goals; assists in preparing recommendations to permitting agencies or landowners to minimize*	

Attachment A - Recommended Benchmark Position Job Duty Comparison

Agency	Matched Position	Why do you disagree with the presented analysis?	What position, if any, do you think is a better match at the agency	Why do you believe the position(s) is a better match?	Additional comments regarding Benefits Detail and/or Total Compensation data.
				impacts on District lands or that may affect District interests; prepares comment letters for review by a more senior level planner or the Planning Manager, as appropriate. • Maintain all project documents, recommend acceptance of assigned projects as being complete and perform project closeout. o District Planner II: *Compiles information for a variety of studies and reports; researches and reviews previous entitlements and records; develops recommendations and prepares written reports on various planning matters.* o District Planner II: *Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings.* • Work with consultants, architects, engineers, end users, building inspectors, maintenance and operations staff, contractors and vendors during the course of projects. o District Planner II: *Develops, administers, and monitors planning and engineering consultant contracts; reviews and manages consultant work and compares tasks completed against invoice amounts to authorize payment.* o District Planner II: *Researches and compiles information for the preparation of use and management plans for District preserves and other planning activities; conducts or directs field or background research; meets with District personnel, members of the public, neighbors, and other agency staff to solicit input and identify problems and opportunities; plans and conducts public workshops and resolves issues.*	
County of Marin	Open Space Planner	Open Space Planner role may supply consultants with necessary information to carry out work, but are not responsible for the management/supervision of consultants like the way District Planner IIs do and as described in the Senior Open Space Planner position.	More experienced role: Senior Open Space Planner	Open Space Planner: 1 year experience Senior Open Space Planner: 3 years' experience The Senior Open Space Planner position may perform duties expected of Assistant Planner or Associate Planner roles, but also performs duties of greater complexity. Senior Planner position is responsible for all aspects of project management from contact administration and supervision of consultant work which is unique to that position, and are required primary functions of District Planner II. <u>Comparable responsibilities of a Senior Planner (verbatim from job descriptions)</u>: • Review and monitor development projects of considerable complexity that affect open space and public trail interests. o District Planner II: *Monitors and conducts external project reviews to identify potential issues or development proposals of private or public lands near or adjacent to open space preserves that may impact District interests and goals; assists in preparing recommendations to permitting agencies or landowners to minimize impacts on District lands or that may affect District interests; prepares comment letters for review by a more senior level planner or the Planning Manager, as appropriate.* • Reviews routine to complex planning projects, which may include land use, management, policy, natural resources, regional, site and long range, and capital improvement planning, design and implementation. o District Planner II: *Participates in the scoping, planning, preliminary design and environmental review of capital improvement projects related to new trails, parking lots, or facilities.*	Open Space Planner: $89,836.50 - $107,367.00 Annually Top Monthly: $8,947.25 Senior Planner: $102,219.00 - $122,304.00 Annually Top Monthly: $10,192.00

Attachment A - Recommended Benchmark Position Job Duty Comparison

Agency	Matched Position	Why do you disagree with the presented analysis?	What position, if any, do you think is a better match at the agency	Why do you believe the position(s) is a better match?	Additional comments regarding Benefits Detail and/or Total Compensation data.
				○ District Planner II: *Reviews routine to complex planning projects, which may include land use, management, policy, natural resources, regional, site and long range, and capital improvement planning, design and implementation.* • Assist with development of open space policies. ○ District Planner II: *Prepares staff reports for use and management plan amendments, feasibility and planning studies, contract solicitation and authorization, permit applications, and grant proposals.* ○ District Planner II: *Compiles information for a variety of studies and reports; researches and reviews previous entitlements and records; develops recommendations and prepares written reports on various planning matters.* • Prepare and assist with preparation of grant proposals. ○ District Planner II: *Participates in the preparation and development of grant applications; assists Grants Program staff with administering grants, monitoring budgets, and submitting reimbursement requests and audit material; addresses project inquiries from granting agencies; prepares necessary grant-supporting reports.* • Supervise and review the work of consultants and contractors and supply same with information necessary to carry out their work on projects in a timely fashion. ○ District Planner II: *Develops, administers, and monitors planning and engineering consultant contracts; reviews and manages consultant work and compares tasks completed against invoice amounts to authorize payment.* ○ District Planner II: *Confers with and advises design and engineering professionals, building and construction professionals, environmental planners and professionals, attorneys, and the general public regarding District development policies and standards; provides and clarifies information relative to land use, environmental compliance, ADA compliance, historic preservation, capital improvement, and other issues.* • Prepare or oversee preparation of environmental review documents and permit applications for open space projects. ○ District Planner II: *Conducts and/or assists with the California Environmental Quality Act (CEQA) environmental analysis of capital improvements, facilities, maintenance activities, and proposed new public uses on District lands. Reviews and prepares CEQA documents (e.g., Initial Studies, Categorical Exceptions, Negative Declarations) and sections of CEQA documents (e.g., Mitigated Negative Declarations and Environmental Impacts Reports) as part of the CEQA Coordination program.* • Prepare or oversee preparation of bid documents for open space projects. ○ District Planner II: *Develops and solicits consultant requests for proposal for professional services; evaluates proposals and recommends award of contract; administers contracts after award*. ○ District Planner II: *Participates in the scoping, planning, preliminary design and environmental review of capital improvement projects related to new trails, parking lots, or facilities.* • Represent the Open Space District at public or private meetings as assigned or necessary. ○ District Planner II: *Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts*	

Attachment A - Recommended Benchmark Position Job Duty Comparison

Agency	Matched Position	Why do you disagree with the presented analysis?	What position, if any, do you think is a better match at the agency	Why do you believe the position(s) is a better match?	Additional comments regarding Benefits Detail and/or Total Compensation data.
				briefings and presents materials, project information, and recommendations at public meetings. o District Planner II: *Researches and compiles information for the preparation of use and management plans for District preserves and other planning activities; conducts or directs field or background research; meets with District personnel, members of the public, neighbors, and other agency staff to solicit input and identify problems and opportunities; plans and conducts public workshops and resolves issues.* • Prepare and assist in the administration of construction contracts, professional service agreements, and other agreements. o District Planner II: *Develops and solicits consultant requests for proposal for professional services; evaluates proposals and recommends award of contract; administers contracts after award.* o District Planner II: *Develops, administers, and monitors planning and engineering consultant contracts; reviews and manages consultant work and compares tasks completed against invoice amounts to authorize payment.*	
Livermore Area Recreation and Park District	N/C				
Marin Municipal Water District	N/C				

ASSOCIATE ENVIRONMENTAL PLANNER

Class Code: PA5

Bargaining Unit: Employees Association

SANTA CLARA VALLEY WATER DISTRICT (CA)
Revision Date: Dec 2, 2019

SALARY RANGE

$120,640.00 - $154,419.20 Annually

DESCRIPTION:

Duties:
To provide environmental policy expertise to management to achieve Board objectives and compliance with environmental regulations and laws; represent District interests in fulfilling its responsibilities under the California Environmental Quality Act (CEQA) and the National Environmental Policy Act (NEPA); to document a clear administrative record of the District's environmental planning and CEQA processes; to advise and guide project teams in the planning, design and execution of plans, projects, activities, and programs in water supply, water utility, flood protection, and watershed stewardship; and to perform a variety of tasks relative to assigned area of responsibility.

Experience:
Five (5) years of experience performing professional-level responsibilities as an environmental planner.
A Master's degree from an accredited college or university with major coursework in environmental studies, environmental planning, city and regional planning, environmental science, natural resources management, geography or related field may substitute for two (2) years of experience.
Two (2) years performing professional-level planning, not involving full-time work on environmental regulations, may substitute for each year of the required environmental planning experience.
Professional certification in a relevant field or subject matter may substitute for a year of experience. This may include, but is not limited to, certification as an: AICP Certified Environmental Planner, AICP Certified Planner, AICP Certified Transportation Planner, Professional Wildlife Biologist, or other certification provided by the state of California or a nationally recognized professional organization related to environmental planning.

Training:
Equivalent to a Bachelor's degree from an accredited college or university with major coursework in environmental studies, environmental planning, city and regional planning, environmental science, natural resources management, geography, or a related field.

Special Requirement:

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Possession of, or ability to obtain, an appropriate, valid California driver's license. Individuals who do not meet the driver's license requirement due to a disability will be considered for a reasonable accommodation on a case-by-case basis. Selected candidate will be required to successfully pass a medical examination.

To review the Classification Specification, please click here

SELECTION PROCESS:

(1) The selection process may include one or more of the following: application review, application assessment, performance exercise, written exercise and/or interview.
(2) The Employment Application, Qualifying Information Questions and/or Supplemental Questions will be evaluated based on the ideal candidate criteria listed above. Resumes are highly recommended.

NOTE: Position and start date is subject to availability of funds. Valley Water retains the right to repost this position as deemed necessary.
Consideration may be given to existing applicant pools within the same classification.

Valley Water's Equal Opportunity Non-Discrimination Policy is available for review upon request.

Valley Water will make reasonable efforts in the examination process to accommodate persons with disabilities. Please advise Human Resources in advance of any special needs by calling 408-630-2260.

Please be aware that once submitted all application materials become the property of Valley Water and will not be returned. Human Resources staff are not authorized to make copies of application materials for applicants.

 ATTACHMENT 1

PROJECT MANAGER

Class Code: EC3

Bargaining Unit: Engineers Society

SANTA CLARA VALLEY WATER DISTRICT (CA)
Revision Date: Dec 20, 2019

SALARY RANGE

$139,672.00 - $178,776.00 Annually

DESCRIPTION:

Duties:
To manage part of a major project or a total project of moderate scope; to perform complex professional project management work as a team member for capital and operating projects and strategic issues within District policies; to participate in and review project initiation, planning, change management, control, and close-out procedures; to provide full supervision to assigned staff; and to perform a variety of tasks relative to assigned area of responsibility.

Experience:
Three (3) years of increasingly responsible project management or analytical experience including the supervision of professional and technical staff related to the field of assignment.

Substitution:
Directly related experience may be substituted for the college requirement on the basis of one and one-half years of experience for one year of education to a maximum of four years.

Training:
Equivalent to a Bachelor's degree from an accredited college or university with major course work in business administration, engineering, public administration, science or a related field.

Special Requirement:
Possession of, or ability to obtain, an appropriate, valid California driver's license. Individuals who do not meet the driver's license requirement due to a disability will be considered for a reasonable accommodation on a case-by-case basis. Selected candidate may be required to successfully pass a medical examination.

To review the Classification Specification, please click here

ATTACHMENT 1

SELECTION PROCESS:

(1) The selection process may include one or more of the following: application review, application assessment, performance exercise, written exercise and/or interview.
(2) The Employment Application, Qualifying Information Questions and/or Supplemental Questions will be evaluated based on the ideal candidate criteria listed above. Resumes are highly recommended.

NOTE: Position and start date is subject to availability of funds. Valley Water retains the right to repost this position as deemed necessary.
Consideration may be given to existing applicant pools within the same classification.

Valley Water's Equal Opportunity Non-Discrimination Policy is available for review upon request.

Valley Water will make reasonable efforts in the examination process to accommodate persons with disabilities. Please advise Human Resources in advance of any special needs by calling 408-630-2260.

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PARK PLANNER

Class Code: 85062

Bargaining Unit: SEIU - Parks General Unit

COUNTY OF RIVERSIDE
Established Date: Sep 27, 2007
Revision Date: Sep 27, 2007

SALARY RANGE

$36.70 - $50.62 Hourly
$6,361.33 - $8,773.96 Monthly
$76,336.00 - $105,287.54 Annually

CLASS CONCEPT:

Under direction, to perform responsible architectural and landscape architectural work in the design and development of plans and specifications for construction of parks and recreational areas; or may examine and review plans and specification prepared by consultants; to provide construction supervision on contract projects; and to do other work as required.

Incumbents of positions in this class report to a Senior Park Planner. Incumbents either design and develop park plans and specifications; or conduct site evaluations and perform preliminary planning and approve specifications developed by consultants. Incumbents are responsible for performing the less complex work with relative independence while closer control would be exercised over the more difficult work. Incumbents may supervise sub-professionals in performing park-planning work.

REPRESENTATION UNIT:

SEIU - Parks General Unit

EXAMPLES OF ESSENTIAL DUTIES:

(Depending on the area of assignment, duties may include, but are not limited to, the following)

- May prepare plans and specifications for major proposed park projects, including buildings, parkways, landscaping, recreational, and sanitary facilities.
- May examine and approve detailed plans and specifications prepared by outside consultants.
- Locate sources and apply for grant funding.
- May prepare site assessment schematics and develop RFP.

- Select, or assist in selecting, consultants and/or parks construction contractors.
- Coordinate obtaining necessary permits and clearance for construction.
- Prepare estimates of needed materials, supplies, and equipment.
- Provide construction supervision of work done under contract to insure compliance with plans and specifications.
- May directly supervise small crews performing work on minor construction or maintenance projects.
- Compile data on departmental maintenance and operation costs for budgeting purposes.
- May represent the department when dealing with the public or others on planning and construction matters.
- Prepare correspondence and reports.

RECRUITING GUIDELINES:

Education: Graduation from an accredited college with a Bachelor's degree in landscape architecture, architecture, urban planning, environmental science, park administration or closely related field. Additional qualifying experience may be substituted for the required education on a year-for-year basis to a maximum of two years.

Experience: One year of experience in park development planning and project management, urban open space planning, land use planning or architectural/landscape design and construction.

Knowledge of: The principles and practices of architecture and landscape architecture, construction, and maintenance; modern surveying and construction methods; construction and landscape materials.

Ability to: Estimate costs and prepare architectural and landscape plans; use proper techniques in the collection, analysis, and presentation of data; work cooperatively with others.

OTHER REQUIREMENTS:

License/Certificate: Possession of a valid California Driver's License may be required for some positions.

PRE-EMPLOYMENT:

All employment offers are contingent upon successful completion of both a pre-employment physical exam, including a drug/alcohol test, and a criminal background investigation, which

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involves fingerprinting. (A felony or misdemeanor conviction may disqualify the applicant from County employment).

PROBATIONARY PERIOD:

As an Approved Local Merit System, all County of Riverside employees, except those serving "At Will," are subject to the probationary period provisions as specified in the applicable Memorandum of Understanding, County Resolution, or Salary Ordinance. Temporary and Per Diem employees serve at the pleasure of the agency/department head.

SENIOR PARK PLANNER

Class Code: 85063

Bargaining Unit: SEIU - Parks Supervisory

COUNTY OF RIVERSIDE
Established Date: Sep 27, 2007
Revision Date: Sep 27, 2007

SALARY RANGE

$40.73 - $56.19 Hourly
$7,059.75 - $9,738.96 Monthly
$84,716.94 - $116,867.50 Annually

CLASS CONCEPT:

Under general direction, to coordinate, oversee and supervise the planning, design, and construction of all County parks and recreational areas and facilities; and to do other related work as required.

The incumbents of this class reports to an Assistant General Manager and are responsible for supervising and/or coordinating and reviewing the work of professional and sub-professional personnel in carrying out a complete park and recreational area development program. The park planning function includes both reviewing plans and supervising the construction of County park facilities.

REPRESENTATION UNIT:

SEIU - Parks Supervisory

EXAMPLES OF ESSENTIAL DUTIES:

(Depending on the area of assignment, duties may include, but are not limited to, the following)

- Assigns and reviews the preparation of plans and specifications for major proposed park projects, including buildings, parkways, landscaping, recreational, and sanitary facilities; Reviews estimates of needed materials, supplies, and equipment.

• Participates in the establishment of short-range and long-range department goals.

• Selects and negotiates with consultants, and reviews their work; Negotiates and prepares construction contracts.

• Locate sources and apply for grant funding; May prepare site assessment schematics and develop RFP.

• Coordinates work with other public agencies, including the Corps of Engineers, Water Quality Control Board, public health agencies, various funding agencies, and others.

• Prepares section budget and participates in development of construction budget.

• Represents the department in dealing with the public or others on planning and construction matters; prepares correspondence and reports.

RECRUITING GUIDELINES:

Knowledge of: Principles of supervision; Principles and practices of engineering architecture and landscape architecture as applied to park and recreational area design, construction, and maintenance; Modern surveying and construction methods; Construction and landscape materials.

Ability to: Plan, schedule, assign, and review professional park planning and construction work; Supervise and coordinate work of subordinates and of contractors; Motivate and evaluate the work performance of subordinates; Estimate costs and prepare plans and budgets; Prepare complete and accurate reports; Negotiate and supervise construction projects; Work effectively with other agencies; Perform technical research; Analyze situations accurately and adopt effective courses of action.

Education: Graduation from an accredited college with a Bachelor's degree in Landscape Architecture, Architecture, Urban Planning, Environmental Science, Park Administration or closely related field. Additional qualifying experience may be substituted for the required education on a year-for-year basis to a maximum of two years.

Experience: Two years of professional experience in park development planning and project management, urban open space planning, land use planning, or the design and construction of park or recreational areas.

OTHER REQUIREMENTS:

License: Possession of a valid California Driver's License may be required.

PRE-EMPLOYMENT:

All employment offers are contingent upon successful completion of both a pre-employment physical exam, including a drug/alcohol test, and a criminal background investigation, which involves fingerprinting. (A felony or misdemeanor conviction may disqualify the applicant from County employment).

PROBATIONARY PERIOD:

As an Approved Local Merit System, all County of Riverside employees, except those serving "At Will," are subject to the probationary period provisions as specified in the applicable Memorandum of Understanding, County Resolution, or Salary Ordinance. Temporary and Per Diem employees serve at the pleasure of the agency/department head.

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URBAN / REGIONAL PLANNER III

Class Code: 74804

Bargaining Unit: SEIU - Professional

COUNTY OF RIVERSIDE
Established Date: Jul 24, 2003
Revision Date: May 10, 2007

SALARY RANGE

$36.18 - $50.62 Hourly
$6,270.71 - $8,773.89 Monthly
$75,248.58 - $105,286.69 Annually

CLASS CONCEPT:

Under direction, to perform difficult and complex urban/regional planning research and evaluation, which examines the interrelationship between social, economic, and physical systems, and public land use policies; prepare planning and environmental studies, reports, plans and projects; explain to the public the County's planning program, policies, ordinances and regulations as they relate to the construction and use of buildings, structures, and the use of land; present studies and recommendations to the administrative, advisory and legislative bodies; and to do other work as required.

The Urban/Regional Planner III class is the fully-qualified working level in the professional Planner series and is characterized by a variety of regular and unusual assignments following standard staff procedures without instruction. Requires frequent choices in the application of a variety of standard planning policies, methods or procedures to specific circumstances. The incumbent solves assignment problems through conference with a project manager, or independently in the absence of a technical leader, subject to later review by a supervisor.

Positions at this journey level may be underfilled by the incumbent's advancement from Urban/ Regional Planner I, to Urban/Regional Planner II and then, to the Urban/Regional Planner III level upon meeting minimum requirements and subject to successful job performance; or, they are filled from an open recruitment where the candidate may be placed on any level in the series depending on meeting the appropriate qualification standards for the level of hire; Urban/Regional Planner IV is the next higher class and differs from this level in that it is the advanced working and lead level in the series.

REPRESENTATION UNIT:

SEIU - Professional

EXAMPLES OF ESSENTIAL DUTIES:

(Depending on the area of assignment, duties may include, but are not limited to, the following)

• Conducts studies necessary to meet urban/regional planning objectives for social, physical, environmental, economic and/or governmental resources, by researching, compiling, synthesizing, analyzing and interpreting information and data, either in the course of routine work (such as processing development applications), or for purposes that are described in a specific assignment (such as drafting parts of developmental policy guidelines or assigned sections of the general plan and area plans) the results of which are submitted for review and acceptance, or for consolidation by a supervisor.

• Contacts other parties (individuals, groups, sections, divisions, departments and regional or state agencies) to discuss review of various technical or legal aspects of projects or programs (i.e., applications for zoning changes, conditional uses, variances, plot plan approvals, and subdivision approvals), some of which may be controversial or politically sensitive, in order to define problems and alternative solutions, by guiding reviews for: consistency with the general plan or other policy plans, compliance with local ordinances and regional and state requirements, and extent of environmental impact; or, to exchange or clarify information used in developing regional plans, including analysis of existing plans and identification of deficiencies in policy or legal authority, and definition of areas for policy consideration and decision, using coordination efforts and/or a negotiation process to achieve the desired outcome, as part of the direction in an ongoing planning process.

• Makes field trips to property sites and surrounding areas to gather facts and conduct investigations of proposed project sites, or in order to have direct knowledge of the location or project under study,. The incumbent will normally use a County vehicle to arrive at the site, and may have to walk or other means to access portions of the property as necessary to examine features requiring detailed evaluation; assignments could include direction to carry out specific tasks (i.e., record field notes, or take photographs and other preparations to assist with related visual displays).

• Prepares written reports used to communicate information, findings and recommendations (often as part of a decision-making process), by assembling pertinent facts in a format adopted for the specific purpose (such as public hearing case reports), with completed work subject to review by a supervisor.

• Makes oral presentations to public groups and governmental bodies to explain and clarify planning reports and recommendations, with presentations supported by subject matter research and data consistent with the needs of the forum or audience.

RECRUITING GUIDELINES:

OPTION I

One year of experience at the level of Urban/Regional Planner II with Riverside County. (Certification of qualifications by the Department Head may be substituted for up to six months of the required experience.)

OPTION II

Required Education: Graduation from an accredited college with a bachelor's degree, preferably with a major in Urban/Regional Planning, Transportation Planning, Public Administration, Architecture, Environmental Science, Geography (with related course concentration), Landscape Architecture, or a closely related field.

Experience: Three years of professional environmental planning, land use planning, and/or transportation planningexperience which must have included performing one of the following kinds of planning activities associated with a planning agency: comprehensive, regional, area, or community planning; plan/proposal review; general plan amendments; zoning; land division; information services; urban renewal; planning administration or transportation planning. (A master's degree in planning may be substituted for one year of the required experience. A master's degree in Public Administration, Architecture, Environmental Science, Geography (with related course concentration), Landscape Architecture, or a closely related field may be substituted for six months of the required experience. No more than one master's degree may be used to substitute for the required experience.)

OPTION III

Certification by and full membership in the American Institute of Certified Planners (AICP).

Knowledge of: The principles, methods, and procedures applicable to land use planning

ATTACHMENT 1

activities and their broad application in a county planning program; the physical, social, environmental, and economic implications of land use planning so as to allow evaluation and reporting on specific proposals; local, state, and federal legislation governing land use development and planning activities at a level necessary to coordinate public and private compliance, both in programs undertaken by the County and those conducted by private development interests; the organizational structure and jurisdiction of governmental agencies involved in the planning process and their interrelationship, responsibilities, and functions, in order to coordinate review, comment and/or approval requirements for planning proposals; the methods involved in designing research studies and identifying and utilizing data sources needed to prepare or evaluate development and policy proposals; the mandate for local government adoption and content of general plan elements, and factors that must be considered in evaluating proposals for consistency with these elements, to allow the review, preparation or updating of elements, and the processing or reporting on development proposals.

Ability to: Plan and carry out work independently to complete a broad scope of professional planning assignments; organize and conduct research, collect, and analyze data, generate and evaluate alternatives, reach logical conclusions, and formulate consistent recommendations as necessary to develop proposals for planning policy or to evaluate proposals and requests carried forward by others; compose clear and thorough study and project reports and recommendations so that they may be communicated to both public and governmental audiences; make oral presentations of study findings and recommendations to a variety of public groups and governmental bodies; work effectively with the general public and community, and governmental boards and commissions to accomplish assigned duties which are part of the overall planning program; interpret and apply laws and regulations pertaining to assigned planning projects and planning case review activities.

OTHER REQUIREMENTS:

License/Certificate: Possession of a valid California Driver's License may be required for some positions.

PRE-EMPLOYMENT:

All employment offers are contingent upon successful completion of both a pre-employment physical exam, including a drug/alcohol test, and a criminal background investigation, which involves fingerprinting. (A felony or misdemeanor conviction may disqualify the applicant from County employment.)

PROBATIONARY PERIOD:

As an Approved Local Merit System, all County of Riverside employees, except those serving "At Will," are subject to the probationary period provisions as specified in the applicable Memorandum of Understanding, County Resolution, or Salary Ordinance. Temporary and Per Diem employees serve at the pleasure of the agency/department head.

ATTACHMENT 1

FACILITIES PROJECT MANAGER II

Class Code: 76602

Bargaining Unit: SEIU - Professional

COUNTY OF RIVERSIDE
Established Date: Aug 1, 1989
Revision Date: Dec 30, 2021

SALARY RANGE

$37.47 - $48.60 Hourly
$6,495.16 - $8,424.42 Monthly
$77,941.97 - $101,093.04 Annually

CLASS CONCEPT:

Under general supervision, provides technical management of a variety of construction, alteration and repair projects and architectural-engineering studies, including space management and facilities or furnishings planning and implementation; performs construction design; assists in the administration of construction contracts; performs other related duties as required.

The Facilities Project Manager II is the fully qualified, journey level classification in the professional Facilities Project Manager series and reports to an appropriate supervisory level classification. Incumbents are assigned to departments that are authorized to construct public works projects and to provide ongoing project management oversight. Incumbents are characterized by performing technical management of a variety of routine to moderately complex construction projects, alteration and repair projects and architectural-engineering studies with limited supervision. Closer supervisory control is exercised over the more difficult work.

The Facilities Project Manager II is distinguished from the Facilities Project Manager III in that the latter is the advanced journey level, which performs complex, major construction projects requiring an advanced knowledge of the principles of architectural design and facility construction, and structural, electrical and mechanical engineering construction.

REPRESENTATION UNIT:

SEIU - Professional

EXAMPLES OF ESSENTIAL DUTIES:

(Depending on the area of assignment, duties may include, but are not limited to, the following)

• Assist in coordinating the development of project concepts and requirements with County department officials to ensure project design is compatible with needs; assist in preparation of project concept proposals and cost estimates.

• Manage and coordinate the scope, schedule, budget, and quality of projects from planning, land acquisition, design, and environmental analysis to construction.

• Assist in the preparation of Requests for Proposals and in the selection of architect-engineering (A-E) firms for designs and/or studies; assist in the review and analysis of A-E firm design/study submittals for compliance with County and engineering standards and for appropriate design applications.

• Assist in preparation of recommendations relative to complex A-E firm design and material submittals; assist in monitoring construction management and inspection efforts of A-E firms.

• Prepare construction design documents, including specifications and drawings for building projects; conduct research and feasibility studies; prepare correspondence and reports as needed.

• Communicate County needs and desires to A-E and construction firms; review and analyze A-E firm design/study submittals for compliance with County and engineering standards and for appropriate design applications; direct and review the work of project personnel and contractors in all phases of work.

• Prepare recommendations relative to complex A-E firm design and material submittals; monitor construction management and inspection efforts of A-E firms.

• Resolve conflicts between cost and technical constraints, legal and regulatory requirements and user needs.

• Prepare and/or copy construction design documents, including specifications and drawings for building projects; conduct research and feasibility studies.

• Prepare correspondence and reports as needed.

RECRUITING GUIDELINES:

OPTION I
Education: Graduation from an accredited college or university with a bachelor's degree in engineering, architecture, construction or business management, business administration, or a closely related field to the assignment.

Experience: One year of professional level engineering, construction or project management, which included responsibility for developing and updating project schedules throughout the design process, tracking construction budgets, managing RFIs (request for information), and coordinating design submittals equivalent to a Facilities Project Manager I with the County of Riverside. (Additional qualifying experience may substitute for the required education on the basis of 30 semester or 45 quarter units equaling one year of full time experience.)

OPTION II
Certificate: Possession of a Project Management Certificate.

Experience: Four years of professional level engineering, construction or project management, which included responsibility for developing and updating project schedules throughout the design process, tracking construction budgets, managing RFIs, and coordinating design submittals equivalent to a Facilities Project Manager I with the County of Riverside. (Additional qualifying education in engineering, architecture, construction or business management, or a closely related field to the assignment may substitute for the required experience on the basis of one year of experience equaling 30 semester or 45 quarter units of education.)

ALL OPTIONS
Knowledge of: The principles of architectural design and facility construction; structural, electrical, and mechanical engineering construction; materials used in facilities construction; Uniform Building Codes, local, state, and federal building construction regulations, and other pertinent safety or construction requirements; building construction cost estimating and contract change order negotiations; budget preparation.

Ability to: Develop and evaluate design and construction standards and criteria; understand, interpret, apply, and enforce codes, regulations, specifications, schedules, and contract provisions; perform calculations used in construction design and cost estimating;

ATTACHMENT 1

communicate effectively in oral and written form; establish and maintain effective working relationships with architects, engineers, contractors, and various public officials.

OTHER REQUIREMENTS:

License: Possession of a valid California Driver's License.

PRE-EMPLOYMENT:

All employment offers are contingent upon successful completion of both a pre-employment physical exam, including a drug/alcohol test, and a criminal background investigation, which involves fingerprinting. (A felony or misdemeanor conviction may disqualify the applicant from County employment.)

PROBATIONARY PERIOD:

As an Approved Local Merit System, all County of Riverside employees, except those serving "At Will," are subject to the probationary period provisions as specified in the applicable Memorandum of Understanding, County Resolution, or Salary Ordinance. Temporary and Per Diem employees serve at the pleasure of the agency/department head.

ATTACHMENT 1

Associate Planner

Class Code: L130

Bargaining Unit: Professional Unit

CITY OF WALNUT CREEK

CITY OF WALNUT CREEK
Established Date: May 1, 1979
Revision Date: Mar 6, 2009

SALARY RANGE

$48.89 - $59.03 Hourly
$3,910.94 - $4,722.30 Biweekly
$8,473.70 - $10,231.65 Monthly
$101,684.44 - $122,779.80 Annually

POSITION DESCRIPTION:

Function:

Under general supervision, performs professional current, advanced, environmental, housing, and/or transportation planning work; and performs related work as required.

Class Characteristics:

Assistant Planner is the entry-level class in the professional planning series. Assistant Planners are assigned planning activities of entry level to moderate difficulty.

Associate Planner is the journey-level class in the professional planning series. Associate Planners are assigned planning work of moderate to high levels of complexity. Associate Planner is distinguished from Assistant Planner by its increased responsibility for project management and independence of decision-making as well as its more complex assignments. Associate Planner is distinguished from Senior Planner by the Senior Planner's greater complexity of assignments received and independence with which to operate.

REPRESENTATIVE DUTIES:

Assistant Planner:

Conducts assigned planning projects involving land use, populations, structures, economic activities, housing, transportation, environmental, and related subjects; conducts research, and confers with applicants, interested parties, and agency representatives to identify problems and opportunities.

Analyzes data with respect to relevant laws, ordinances, regulations, and policies; determines methods to reconcile project conflicts with local requirements and State and Federal law.

Prepares professional staff reports of summarized data, conclusions, and recommendations; makes oral presentations to the public, and elected and appointed decision makers including the City Council and Commissions.

Receives and reviews planning applications; coordinates review with various City and outside agencies; works as part of a team on complex applications and long range planning projects; responds to inquiries both orally and in writing; interprets City policies, local ordinances, and State laws, within established parameters; explains City procedures in person, over the phone, and in writing.

Drafts a variety of written documents including letters, reports, grants, resolutions, findings, ordinances, amendments to ordinances, and California Environmental Quality Act documents.

Works extensively on the computer to manage case-loads, produce written documents, prepare maps and graphics, analyze data, research on the Internet, and communicate with others through e-mail.

Attends meetings and conferences as assigned.

Associate Planner:

In addition to the representative duties for Assistant Planner:

May lead a team on complex applications and long range projects.

Prepares and oversees the preparation of graphs, charts, and other displays.

Provides information on City, regional, and State environmental, zoning, subdivision, housing, and transportation planning requirements to consultants, developers, property owners and the general public.

May administer contracts and oversee the work of consultants.

ATTACHMENT 1

May provide staff support to City agencies, commissions, or ad-hoc advisory groups.

May mentor junior staff.

Contacts and Relationships:

Contacts are with other City employees, the general public, residents, developers, development professionals, interested organizations, property owners, consultants, and other public agencies.

Accountability:

The employee is responsible for complying with all City safety requirements and practices. Additionally, the employee is responsible for ensuring that any direct reports also comply with all City safety requirements and practices.

Assistant Planner: Most of the employee's work assignments include specific directions and are performed within the limits of prescribed policies and guidelines. The employee is expected to develop a level of knowledge and ability that will permit upward progression.

Associate Planner: The employee is responsible for handling assigned tasks independently and for demonstrating a level of competence appropriate to a qualified professional planner in land-use, housing, or transportation planning.

QUALIFICATIONS GUIDELINES:

Education and Experience:

As described in the following table; or any equivalent combination of education and experience that provides the knowledge, skills, and abilities listed below.

Class
Education
Experience

Assistant Planner
A Bachelor's degree from an accredited four-year college or university with major coursework in urban planning, architecture, public administration, housing, transportation planning, or a related field.
None required.

Associate Planner
A Bachelor's degree from an accredited four-year college or university with major coursework in urban planning, architecture, public administration, housing, transportation planning, or a related field.
A minimum of two years of professional experience in the assigned field.

Special Requirement:

Possession of, or ability to obtain prior to employment, a valid Class C California Driver's License and a good driving record.

Knowledge, Skills, and Abilities:

Assistant Planner:
Knowledge of Federal, State, and local laws and policies, and best practices and principles, related to planning, zoning, housing, transportation planning, and/or environmental planning.

Knowledge of statistics and research methods employed in collection and evaluation of data.

Skill in understanding and interpreting technical data and documents.

Skill in reading and interpreting applicable codes, ordinances, and regulations.

Skill in collecting, recording, analyzing, and interpreting data.

Skill in communicating effectively in English both orally and in writing; making presentations; and preparing clear, concise, and accurate written materials.

Skill in establishing and maintaining effective working relationships with others.

Ability to effectively utilize computer applications and technology related to the work.

Associate Planner:

In addition to the qualifications for Assistant Planner:

Considerable knowledge of Federal, State, and local laws and policies, and best practices and principles, related to planning, zoning, housing, transportation planning, and/or environmental planning.

Considerable knowledge of research methods employed in the collection, evaluation, and presentation of data.

Skill in applying urban, environmental, housing, zoning, and transportation planning principles and methods to local problems.

WORKING CONDITIONS/PHYSICAL REQUIREMENTS:

Work is performed mainly indoors with occasional field visits. The work generally involves a high degree of concentration. There may be some light physical work involved in the handling of supplies, files, etc.

Physical requirements include the following:

Ability to sit for long periods of time, stoop, kneel, crouch, reach, finger, grasp, write, and perform repetitive motions.

Exerts up to 20 pounds of force occasionally and/or a negligible amount of force frequently to lift, carry, push, pull or otherwise move objects with the human body.

Hearing and speaking ability sufficient to carry on a conversation with another individual (or groups of individuals) in person and over the telephone.

Visual ability sufficient to read and produce printed material and information displayed on a computer screen.

CLASSIFICATION HISTORY:

6/18/2017 Change in class code from G110

FLSA STATUS:

Exempt

ATTACHMENT 1

Senior Planner

Class Code: M540

Bargaining Unit: General Management Unit

CITY OF WALNUT CREEK

CITY OF WALNUT CREEK
Established Date: May 1, 1979
Revision Date: Sep 24, 2017

SALARY RANGE

$57.62 - $69.73 Hourly
$4,609.51 - $5,578.23 Biweekly
$9,987.27 - $12,086.17 Monthly
$119,847.26 - $145,033.98 Annually

POSITION DESCRIPTION:

Function: To perform professional and technical planning duties requiring specialized knowledge; to plan, organize, direct and supervise assigned staff engaged in current land-use planning, long range land-use planning, or transportation planning; to provide highly responsible professional support to assigned management; and to perform related work as required.

Class Characteristics: This is the advanced-journey level class in the professional Planner series. The Senior Planner class is assigned complex planning studies and proposal reviews, may provide program management, and assists in program administration. The Senior Planner serves as a program and project leader and a zoning administrator, provide direct supervision over assigned professional staff, and may serve as staff to City Commissions. Work in this class is distinguished from that of Associate Planner by the greater complexity of assignments received and by the greater independence with which to operate. Senior Planner is distinguished from Principal Planner which is responsible for planning, organizing, and directing the activities of a section.

Supervision Received and Exercised:

Receives general direction from assigned management staff.

Exercises direct supervision over professional and technical staff.

REPRESENTATIVE DUTIES:

Plan, organize, and coordinate an assigned aspect of the City's current land-use planning, long range land-use planning, or transportation planning.

Recommend and assist in the implementation of goals and objectives; establish schedules and methods for assigned program area; implement policies and procedures.

Plan, prioritize, assign, supervise, and review the work of staff involved in current land-use planning, long range land-use planning, or transportation planning.

Evaluate operations and activities of assigned responsibilities; recommend improvements and modifications; prepare various reports on operations and activities.

Participate in budget preparation and administration; prepare cost estimates for budget recommendations; submit justifications for staffing, projects, and related activities; monitor and control expenditures.

Participate in the selection of staff; provide or coordinate staff training; work with employees to correct deficiencies; implement discipline procedures.

Review assigned projects and design project methods and procedures; gather, analyze, and interpret data relating to local social, economic, population, housing, development, environmental, zoning, transportation, traffic, and land use issues; prepare comprehensive reports and recommend courses of action.

Provide advice and information to the general public and developers regarding applicable codes, regulations, and requirements; clarify and ensure conformance to City codes and regulations; participate in or conduct conferences with developers and property owners, and resolve differences that may exist between them and City codes.

Work closely with other City staff through coordinating project comments, plan checking, permit approval, and conducting inspections.

Make oral presentations to the City Council, City Commissions, and citizen groups.

Prepare long range plans, special reports, studies, and correspondence as required; recommend changes to City codes, regulations, and policies.

Attend meetings of regional and other government agencies on topics affecting the City; analyze policies of other jurisdictions and attempts to resolve regulation and policy conflicts among jurisdictions.

ATTACHMENT 1

As assigned, serve as City Zoning Administrator; supervise the Code Enforcement Officers; serve as Secretary to City Commissions; review zoning administrator staff reports, conduct public hearings, and issue findings.

Administer contracts and oversee the work of consultants; Conduct site visits and field investigations.

Work extensively using a computer to manage case-loads, produce written documents, prepare maps and graphics, analyze data, conduct research, and communicate with others through e-mail.

Build and maintain positive working relationships with co-workers, other employees and the public using principles of good customer service.

Foster an environment that embraces diversity, integrity, trust, and respect.

Be an integral team player, which involves flexibility, cooperation, and communication.

Perform related duties as assigned.

QUALIFICATIONS GUIDELINES:

Education and Experience A Bachelor's degree from an accredited four-year college or university with major coursework in urban planning, architecture, public administration, housing, transportation planning, or a related field, and a minimum of three years of professional municipal experience in the assigned field; or any equivalent combination of education and experience that provides the knowledge, skills, and abilities listed below:

Special Requirement Possession of, or ability to obtain prior to employment, a valid Class C California Driver's License and a good driving record.

Knowledge, Skills, and Abilities:

Thorough knowledge of Federal, State and local laws, and best principles and practices, related to planning, zoning, transportation planning, environmental planning, and/or code enforcement.

Thorough knowledge of research methods employed in the collection, evaluation, and presentation of data.

Knowledge of principles and practices of supervision, training, and performance evaluation.

Skill in collecting, analyzing, and interpreting data and documents.

Skill in planning, organizing, and conducting studies.

Skill in applying planning principles and methods to local problems.

Skill in communicating effectively in English both orally and in writing; making presentations; and preparing clear, concise, and accurate written materials.

Skill in understanding and interpreting technical data.

Skill in effectively leading teams.

Skill in establishing and maintaining effective working relationships with others.

Ability to organize, implement, supervise, and perform complex planning work.

Ability to supervise, effectively train, and evaluate assigned staff.

Ability to effectively utilize computer applications and technology related to the work.

WORKING CONDITIONS/PHYSICAL REQUIREMENTS:

Work is performed mainly indoors with occasional field visits. The work generally involves a high degree of concentration. There may be some light physical work involved in the handling of supplies, files, etc.

Physical requirements include the following:

Ability to sit for long periods of time, stoop, kneel, crouch, reach, finger, grasp, write, and perform repetitive motions.

Exerts up to 20 pounds of force occasionally and/or a negligible amount of force frequently to lift, carry, push, pull or otherwise move objects with the human body.

Hearing and speaking ability sufficient to carry on a conversation with another individual (or groups of individuals) in person and over the telephone.

Visual ability sufficient to read and produce printed material and information displayed on a computer screen.

CLASSIFICATION HISTORY:

6/18/2017 Change in class code from G115.
9/24/17 Change in class code from L140, revisions to the class spec, and reallocation from the Professional Unit to the General Management Unit

FLSA STATUS:

Exempt

ATTACHMENT 1

Project Manager

Class Code: M110

Bargaining Unit: General Management Unit

CITY OF WALNUT CREEK
Established Date: Nov 1, 2004
Revision Date: Mar 26, 2014

SALARY RANGE

$59.38 - $72.18 Hourly
$4,750.78 - $5,774.41 Biweekly
$10,293.36 - $12,511.22 Monthly
$123,520.28 - $150,134.66 Annually

POSITION DESCRIPTION:

Function:

Under administrative direction, directs, organizes, and manages projects or programs within a defined scope; develops, plans, administers, and leads departmental or cross-functional teams as required to achieve desired goals; supervises staff; serves as a member of the Department's management team and participates in departmental policy development, administrative planning, and problem resolution; and performs related work as required.

Class Characteristics:

This is a broad class that may be assigned to coordinate a range of projects or programs of varying complexity and scope. Positions in this class function in a variety of ways. For example, some positions may manage multiple projects or programs on an ongoing basis while others exercise broad authority over and coordinate complex projects of high visibility and impact on a limited-term basis. Depending upon the assignment, employees in this class may be responsible for a major technical program that requires academic or technical background, including licenses and/or registration required by the field. The employee may be assigned to supervise staff.

REPRESENTATIVE DUTIES:

Organizes, coordinates, and manages one or more major projects or programs in cooperation with other departments, outside agencies, contractors, work teams, and others as required.

Develops and monitors work plans, project goals, and schedules, including recommending and implementing changes.

Develops work schedules, assigns tasks, supervises, directs, mentors, reviews, and evaluates the performance of assigned staff; makes recommendations on personnel actions, budgetary needs, and other administrative matters; reviews and approves time cards.

Analyzes and prepares written reports on program and project performance using project management methods and techniques; prepares and administers budgets, contracts and other administrative functions.

Establishes and maintains systems and procedures to meet compliance requirements and support effective and efficient operations; interprets and applies policies, regulations, codes, and contracts, in consultation with staff and others as required to ensure clear communication and integration of business processes.

Serves as principal contact for assigned projects or programs; confers with department directors and other officials concerning regulations, procedures, and policies; represents the City in a variety of meetings regarding program coordination and regulatory requirements; coordinates project activities with other City departments, Commissions, advisory bodies, and outside agencies.

Develops and maintains information and statistical reports regarding program performance, service levels, and results.

Manages vendor selection process and administers vendor contracts as necessary; writes grant applications, requests for proposals, and contracts.

Contacts and Relationships:

Employee has a wide range of contacts regarding issues of significant importance and consequence to the City, including elected and appointed City officials, Boards and Commissions; representatives of public agencies and private organizations; and the public. At times, the employee speaks for the department or the City as a whole on selected issues.

Accountability:

The employee is responsible for managing assigned projects, subject to policy parameters and general administrative review by the division head or department director.

ATTACHMENT 1

The employee is responsible for complying with all City safety requirements and practices. Additionally, the employee is responsible for ensuring that any direct reports also comply with all City safety requirements and practices.

QUALIFICATIONS GUIDELINES:

Education and Experience:

A Bachelor's degree from an accredited four-year college or university with a major in Business Administration, Public Administration, or a field relevant to assigned duties. Possession of a Master's Degree in Business or Public Administration, or a relevant field, is highly desirable. A minimum of four years of progressively responsible technical and project coordination experience in management or a professional field, and some supervisory and project management experience; or any equivalent combination of education and experience that provides the knowledge, skills, and abilities listed below.

Special Requirements:

Possession of, or ability to obtain prior to employment, a valid Class C California Driver's License and a good driving record.

Depending upon the occupational area assigned, additional licenses, certifications, registrations, and/or qualifications may be required.

Knowledge, Skills, and Abilities:

Thorough knowledge of the theories, principles, and practices of the field relevant to assigned duties.

Thorough knowledge of project development, scheduling, and control systems used in project management.

Considerable knowledge of the principles of change and skill in leading others through the change process.

Considerable knowledge of public and business administration and systems, including management, finance, and human resource management.

Knowledge of the principles and practices of supervision and the ability to plan, organize, train, direct, and evaluate the work of designated staff.

Working knowledge of other City departments, particularly as their operations may relate to the program or project assigned.

Skill in communicating effectively in English both orally and in writing; making oral presentations; and preparing clear and concise correspondence and reports.

Skill in establishing and maintaining effective working relationships with others.

Ability to analyze business problems and identify appropriate solutions.

Ability to interpret ordinances, legislation, contracts, and legal documents; analyze and interpret factual data; and apply complex guidelines.

Ability to effectively utilize computer applications and technology related to the work.

WORKING CONDITIONS/PHYSICAL REQUIREMENTS:

Work is performed both indoors and outdoors. Work generally involves a high degree of concentration, especially in the consideration of technical issues. The employee is exposed to hazards associated with working in and around construction projects and traffic in varying weather conditions.

In addition, if assigned as Arborist:

The employee may occasionally perform tree maintenance duties and work on uneven terrain. Work may involve climbing ladders, reaching, and working on a boom truck. There may be exposure to hazards from equipment and chemicals.

For all assignments:

Physical requirements include the following:

Ability to sit for long periods of time, stoop, kneel, crouch, reach, finger, grasp, write, and perform repetitive motions.

Exerts varying amounts of force on an intermittent basis in order to lift, carry, push, pull, or otherwise move objects with the human body.

Hearing and speaking ability sufficient to carry on a conversation with another individual (or groups of individuals) in person and over the telephone.

Visual ability sufficient to read and produce printed material and information displayed on a computer screen.

CLASSIFICATION HISTORY:

Changed unit from Professional to General Management and class code from G190 to D295 on 3/14/14. Revised classification specification effective 3/26/14. 6/18/2017 Change in class code from D295.

FLSA STATUS:

Exempt

Close

Print

PARK PLANNER I (#GW2)

$33.21-$42.03 hourly / $5,756.00-$7,285.00 monthly / $69,076.80-$87,422.40 yearly

PARK PLANNER II (#GW4)

$39.11-$49.50 hourly / $6,779.00-$8,580.00 monthly / $81,348.80-$102,960.00 yearly

PARK PLANNER III (#GW6)

$43.11-$54.57 hourly / $7,472.00-$9,459.00 monthly / $89,668.80-$113,505.60 yearly

PARK PLANNER IV (#GW8)

$50.00-$63.26 hourly / $8,667.00-$10,965.00 monthly / $104,000.00-$131,580.80 yearly

Email Me when a Job Opens for the above position(s)

Definition

Under direction, conducts park planning and acquisition studies; oversees master plan development and construction projects for parks and recreation facilities; prepares grant applications, construction documents, master plans and administer grant programs, design contracts and construction contracts; may serve as a project leader or specialist; and performs other work as required.

Distinguishing Characteristics

Park Planner I is the trainee level for the professional park planner series. Incumbents initially work under general supervision and as experience is gained they perform a broader range of duties and are expected to advance to the Park Planner II level within 18 months.

Park Planner II is the journey level in the park planner series. Incumbents independently perform professional planning assignments with limited supervision. This class differs from the Park Planner I in that it is responsible for design and management of assigned projects. Incumbents may provide assistance to lower level park planners and may make presentations to internal and community groups as well as decision-making authorities.

Park Planner III is the senior or advanced journey level in the park planner series. Incumbents use independent judgment to perform diverse, complex assignments, which require extensive coordination with other land use agencies, County departments, other agencies and public groups. Additionally incumbents are required to make presentations to the public, the Parks and Recreation Commission, the Planning Commission and the Board of Supervisors. This class is distinguished from the lower level park planners and handles controversial and technically complex assignments. Incumbents may serve as project leader on multi-faceted programs or planning efforts.

Park Planner IV is the department resource and specific subject area expert in the park planner series. This level requires possession of a valid design license or certificate of registration as an architect, civil engineer and/or landscape architect from the State of California. Incumbents are expected to perform any field or office assignment with a minimum amount of supervision and work under general direction as a project manager in charge of a small group of subordinate park planners and/or paraprofessional staff, public study groups or planning staff engaged in a wide variety of responsible park development work and other major projects. Park Planner IV may also review and approve complex plans and specifications prepared by lower level park planners to assure conformity to State and/or County design criteria and standards. The Park Planner IV class differs from the higher class of Park Planning and Development Manager, who is at a full supervisory level and responsible for the design section of the Department.

Typical Tasks

Research grant sources, prepares and assists in the administration of grant programs and construction projects; prepares park planning and acquisition studies including land use and master plans for parks; researches land use regulations and constraints to ensure park acquisition is consistent with appropriate regulations; make field investigations of proposed park, recreation or historic sites to assess suitability and potential use; gathers data to appraise property for future park acquisition; conducts public needs assessments, determines fiscal resources and environmental requirements and prepares land acquisition reports; coordinates park planning activities with other County Departments and public agencies; prepares working drawings, specifications and cost estimates; prepares bid proposals and requests of quotes for architectural and engineering services and reviews and makes recommendations on bids and quotes; obtains local, state and federal approvals and permits; performs park layouts and survey work; serves as parks construction project inspector by reviewing and inspecting work to ensure conformance to plans, specifications and departmental and County standards; recommends design changes and change orders; may conduct public meetings and hearings; prepares reports and correspondence; attends meetings and conferences; inputs, accesses and analyzes data using a computer.

Employment Standards

Knowledge:

Park Planner I

- Some knowledge of principles, practices and trends of park planning or of the specialty area to which assigned.
- Some knowledge of statistical research methods as applied to the collection and tabulation of data affecting park planning.
- Some knowledge of laws, ordinances and regulations governing park planning in California.
- Some knowledge in either the preparation of construction documents and/or construction inspection.

Park Planner II

- Working knowledge of the above.
- Working knowledge of the principles, practices and trends of park planning and development.
- Working knowledge of parks design and cost estimating, including construction documents.
- Some knowledge of laws, ordinances and regulations related to parks planning and development.
- Some knowledge of grants and contract development and administration including inspection of construction projects.
- Some knowledge of public project funding principles and procedures and capital project implementation.

Park Planner III

- Working knowledge of the above.
- Working knowledge of long range project planning practices.
- Working knowledge of laws and regulations related to planning, zoning and environmental protection pertaining to park projects.
- Some knowledge of methods and procedures of land acquisition.
- Some knowledge of data processing applications.

Park Planner IV

- Thorough knowledge of the above.
- Working knowledge of the community design process.
- Working knowledge of policy formulation.
- Some knowledge of the principles and techniques of project leadership and review.

Abilities:

Park Planner I

- Collect, analyze and compile, organize and present technical statistical and related information pertaining to park planning research.
- Prepare concise written and oral reports.
- Participate in park planning presentations before official bodies.

- Provide services to the public in a courteous and effective manner.
- Participate cooperatively and effectively as a contributing team member.
- Prepare construction plans, charts, maps and other graphic illustrations.
- Produce acceptable work commensurate with the level of appointment in an acceptable timeframe.
- Establish and maintain effective working relationships with others.

Park Planner II

- Perform all of the above.
- Prepare and present studies, reports, requests for proposals, grant applications and concept plans.
- Speak effectively before groups.
- Understand, interpret, explain and apply laws, ordinances, rules, and policies, regulations and construction documents.
- Prepare park concept plan; landscape construction plans, specifications and cost estimates.
- Oversee and inspect park construction projects.
- Learn to input, access and analyze data using a computer.

Park Planner III

- Perform all of the above.
- Present major planning studies analyses and reports to boards, commissions and committees.
- Complete complex assignments, determine alternative choices and make recommendations.
- Prepare clear and concise administrative and technical reports, resolutions, permit applications and environmental documents associated with park development, oversee the park master process from consultant selection to final approval.
- Evaluate design proposals and construction documents prepared by others.
- Provide leadership to team efforts, including public groups.

Park Planner IV

- Perform all of the above.
- Track, monitor and advocate legislation.
- Enforce common safety practices and procedures.
- Act as subject matter expert or resource.
- Assign, schedule and review the work of subordinates on assigned projects.

Training and Experience:

Any combination of training and experience, which would provide the required knowledge and abilities, is qualifying. A typical way to obtain these knowledge and abilities would be:

Park Planner I: Two years experience in public or private landscape architectural, architectural, or

civil engineering practices, plus completion of 12 semester units of college course work in park planning, park management or administration, or civil engineering, landscape architecture, architecture.

OR

Possession of a Bachelor's Degree from an accredited college or university in parks planning, architecture, civil engineering, landscape architecture or related field.

OR

Possession of a valid Landscape Contractor or Building Contractor License issued by the State of California, plus completion of 12 semester units of college course work in park planning, architecture, civil engineering, landscape architecture, or related field.

Park Planner II: One year of professional park planning experience equivalent to a Park Planner I at Santa Cruz County.

Park Planner III: One year of experience that is equivalent to a Park Planner II at Santa Cruz County.

OR

Two years of experience in landscape architecture or closely related professional experience with a Bachelor's Degree in parks planning, architecture, civil engineering, landscape architecture or related field.

Park Planner IV: One year of park planning experience equivalent to a Park Planner III at Santa Cruz County.

SPECIAL REQUIREMENTS

Possession of valid California class C driver license, or the ability to provide suitable transportation which is approved by the appointing authority (Additional for Park Planner IV). Possession of a valid design license or certificate of registration as an architect, civil engineer and/or landscape architect from the State of California.

Miscellaneous

Bargaining Unit: General Rep
EEOC Job Category: 02
Occupational Grouping: 28
Worker's Comp Code: 0053
Analyst: JS

CLASS: GW2; **EST:** 1/1/1991; **REV:** 9/1/1993;

CLASS: GW4; **EST:** 1/1/1991; **REV:** 9/1/1993;

CLASS: GW6; **EST:** 1/1/1991; **REV:** 9/1/1993;

CLASS: GW8; **EST:** 1/1/1991; **REV:** 9/1/1993;

ASSOCIATE PLANNER

Class Code: 353

Bargaining Unit: Service Employees' International Union

CITY OF PALO ALTO
Established Date: Jul 1, 2004
Revision Date: Jun 27, 2011

SALARY RANGE

$48.28 - $59.27 Hourly
$8,368.53 - $10,273.47 Monthly
$100,422.40 - $123,281.60 Annually

DESCRIPTION:

Reports To:	Assistant Planning Official, Zoning Administrator, or Chief Transportation Official
Supervises:	Non-supervisory position

Purpose of Classification

Assists in performing professional planning functions and preparing planning studies and tasks required by the Planning and Transportation Divisions. Those functions and tasks include environmental review, architectural review, project review, single family plan checking, assistance in special planning and transportation study preparation, assistance in Community Development Block Grant and other federal, state and local housing programs, assistance in Comprehensive Plan element preparation and maintenance of planning and transportation data files.

Distinguishing Characteristics

The Associate Planner classification is found in the Planning and Community Environment Department. It is distinguished from the Planner classification in that the latter handles more complex assignments under minimal supervision.

ESSENTIAL DUTIES:

Essential and other important responsibilities and duties may include, but are not limited to, the following:

- Prepares environmental assessments on projects submitted for City approval
- Assists in the evaluation of projects submitted for Architectural Review Board (ARB) review
- Prepares and assembles materials for Architectural Review Board or Planning Commission packets
- Checks plans of new single-family homes and remodels for zoning compliance
- Prepares reports, which include all necessary research, on projects submitted to the City for approval that require Planning or Transportation Division evaluation

- Prepares reports, which include all necessary research, planning and transportation studies for appointed boards, commissions, committees, the City Council or other City staff.
- Assists in plan preparation, coordination, monitoring and other activities related to the Community Development Block Grant (CDBG), City recycling and waste diversion programs and other federal, state and local housing programs, as assigned
- Conducts on-site inspection/condition monitoring during construction
- Prepares revised elements to the Comprehensive Plan.
- Makes public presentations before appointed boards, commissions, committees, community groups, and the City Council
- Maintains Planning or Transportation Division data files.

Related Functions: Perform related duties and responsibilities as required.

MINIMUM QUALIFICATIONS:

Sufficient education, training and/or work experience to demonstrate possession of the following knowledge, skills, and abilities which would typically be acquired through:

- Bachelor's degree in Urban Planning, Environmental Studies or related field from an accredited college or university

and

- Two years of related experience in urban, conservation, or transportation planning

Special Requirements:

- Possession of a valid California Driver's License.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Ability to write clearly and communicate effectively.
- Ability to communicate with others, make sound decisions, and to assimilate and understand information in a manner consistent with the essential job functions.
- Ability to analyze planning and transportation issues/problems in a clear and concise manner
- Ability to develop responses and solutions to planning, environmental, or transportation issues.

- Ability to maintain physical condition appropriate to the performance of assigned duties and responsibilities, which may include sitting for extended periods of time and operating assigned equipment and vehicles.

WORKING CONDITIONS / PHYSICAL REQUIREMENTS:

Regular field work is necessary in order to perform environmental review on all projects assigned; work in an office environment; sustained posture in a position for prolonged periods of time.
JD353

> The City of Palo Alto is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, the City will provide reasonable accommodation to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.

SENIOR PLANNER

Class Code: 318

Bargaining Unit: Service Employees' International Union

CITY OF PALO ALTO
Established Date: Oct 1, 1995
Revision Date: Jul 25, 2011

SALARY RANGE

$59.59 - $73.17 Hourly
$10,328.93 - $12,682.80 Monthly
$123,947.20 - $152,193.60 Annually

DESCRIPTION:

Reports To:	Assistant Planning Official, Zoning Administrator, Chief Transportation Official or Assistant Transportation Official
Supervises:	May assign work to technical and temporary personnel and provide coordination of project staff teams

Purpose of Classification

Under very minimal supervision, performs complex professional planning functions required in the Planning or Transportation Divisions. These functions include: environmental review, project review, special planning or transportation study preparation, historic preservation, assistance in Community Development Block Grant and other Federal, State and local housing programs and comprehensive plan element preparation. Position may act as project manager on assigned projects, including coordination of the work of other professional and technical personnel.

Distinguishing Characteristics

The Senior Planner classification is found in the Planning and Community Environment Department. It is distinguished from the Planner classification in the handling of more complex assignments under less supervision.

ESSENTIAL DUTIES:

Essential and other important responsibilities and duties may include, but are not limited to, the following:

- Supervises preparation of environmental impact reports on projects submitted for City approval.
- Evaluates the design of large, complex projects submitted for Architectural Review Board (ARB) review.
- Prepares reports, including coordinating the work of other staff members, on special planning or transportation studies for the Architectural Review Board, Historic Resources Board, Planning Commission, City Council, appointed committees and other City staff.

- Assists in plan preparation, coordination, monitoring and other activities related to the Community Development Block Grant (CDBG) and other federal, state and local housing programs.
- Prepares revised elements to the Comprehensive Plan.
- Coordinates and monitors the work of planning, environmental and transportation consultants.
- Coordinates and monitors implementation of the Cityð=s Historic Preservation Program.
- Makes public presentations before appointed boards, commissions, committees, and the City Council.

Related Functions:

- As needed, assigns and monitors work of technical, subordinate professional and temporary personnel who may assist in the above tasks.
- Perform related duties and responsibilities as required.

MINIMUM QUALIFICATIONS:

Sufficient education, training and/or work experience to demonstrate possession of the following knowledge, skills, and abilities which would typically be acquired through:

- Bachelor's degree in Urban Planning, Architecture, Historic Preservation or a directly related field from an accredited college or university. An advanced degree is highly desirable.

and

- Five years of suitable professional experience in urban planning (or substitute for up to two years of experience a master's degree in planning or a related field).

Special Requirements:

- Possession of a valid California Driver's License.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Ability to analyze planning issues and problems in a clear and concise manner.
- Knowledge of and the ability to implement federal and state historic preservation guidelines.

- Ability to communicate verbally and in writing; work effectively with citizenð=s groups and the public and recognized committees, and make presentations to public review bodies.
- Ability to handle a variety of complex assignments involving different analytical approaches.
- Ability to provide project leadership.
- Ability to write clearly and communicate effectively.
- Ability to work with a minimum of supervision.
- Ability to maintain physical condition appropriate to the performance of assigned duties and responsibilities which may include sitting for extended periods of time and operating assigned office equipment and vehicles.
- Ability to communicate with others and to assimilate and understand information, in a manner consistent with the essential job functions.
- Ability to operate assigned equipment.
- Ability to make sound decisions in a manner consistent with the essential job functions.

WORKING CONDITIONS / PHYSICAL REQUIREMENTS:

Work in an office and field environment; may travel from site to site; some exposure to dust and noise; some lifting, standing, walking, sitting and climbing; may work in inclement weather conditions.
JD318

The City of Palo Alto is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, the City will provide reasonable accommodation to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.

COUNTY OF SONOMA (CA)
Established Date: May 1, 1979

PARK PLANNER II

Bargaining Unit: SEIU-05

Class Code: 1253

SALARY RANGE

$45.27 - $55.03 Hourly
$3,634.00 - $4,417.47 Biweekly
$7,873.66 - $9,571.18 Monthly
$94,483.92 - $114,854.21 Annually

DEFINITION:

Under direction, conducts park planning studies and prepares plans and reports; designs parks, park facilities and structures; prepares and administers grant programs and construction contracts; and does related work as required.

Distinguished Characteristics:
This is the full professional working level in the Park Planner series. An employee in this class is expected to exercise independent judgement and perform the full range of duties in park planning, including preparation of long-range or county-wide studies, resource and environmental studies, acquisition studies, funding applications, master plans and preliminary site plans, or in-park design, including preparation of feasibility studies, master plans, site plans, development plans, construction drawings, specifications and cost estimates.

This class differs from Park Planner I which is the entry and training level class in the Park Planning series. This class differs from Supervisor of Park Planning and Design which is a division head responsible for supervising all park planning and design activities throughout the County.

TYPICAL DUTIES:

Makes preliminary field investigations of proposed park, recreation or historic sites to assess suitability and potential usage; determines size, configuration, access modes and basic design; prepares preliminary site plans.

Gathers information and evaluates public demand and usage needs, potential fiscal resources and environmental requirements; prepares land acquisition reports, master plan reports and environmental assessment reports; makes recommendations and presents alternative proposals.

Coordinates land acquisition process with land owners, title companies, appraisers, and related agencies and departments; provides technical advice during negotiation.

Designs parks and park facilities; reviews and interprets aerial photographs and topological maps; participates in or reviews work of consultants engaged in preparation of site and facility development plans, landscape plans, grading plans, detail designs, construction drawings

and specifications; prepares cost estimates and documents for public bid or construction.

Supervises construction of park facilities; reviews and inspects work to ensure conformance with plans, specifications, and departmental and county standards.

Prepares and administers grant applications and programs for park acquisition and development.

Conducts public meetings to present public information and elicit response; makes presentations to the Board of Supervisors and other public bodies.

Participates with public groups and other county departments and public agencies in preparation of long-range and county-wide plans and special studies.

May lead and train others on a project basis.

KNOWLEDGE, SKILLS, AND ABILITIES:

Considerable knowledge of: park planning terminology, principles and techniques; recreational planning principles; principles, methods and techniques of land use and environmental and site planning.

Working knowledge of: land acquisition, land transfer and zoning principles; public project funding principles and procedures; construction procedures; park development processes and procedures; practices of contacts preparation and administration.

Ability to: establish and maintain effective working relationships with other employees, public officials, private consultants, contractors and the public; research, gather, organize and analyze information; write and speak persuasively; present recommendations and alternative proposals.

MINIMUM QUALIFICATIONS:

Any combination of training and experience which would likely provide for possession of stated knowledge and abilities. A typical example would be two years of experience in park planning, planning, architecture or landscape architecture.

License: Possession of a valid driver's license at the appropriate level including necessary special endorsements, as required by the State of California to perform the essential job functions of the position.

COUNTY OF SONOMA (CA)
Established Date: Feb 24, 2009
Revision Date: Aug 9, 2010

SENIOR PARK PLANNER

Bargaining Unit: SEIU-05

Class Code: 1254

SALARY RANGE

$53.79 - $65.37 Hourly
$4,317.93 - $5,247.50 Biweekly
$9,355.52 - $11,369.59 Monthly
$112,266.18 - $136,435.03 Annually

DEFINITION:

Under direction, conducts and reviews park planning studies and prepares plans and reports; provides technical oversight of the Planning Division for park improvement projects; oversees master plan development and construction projects for park and recreation facilities; designs parks, park facilities and structures; prepares and administers grant programs and construction contracts; may serve as a project lead or specialist; performs related work as required.

DISTINGUISHING CHARACTERISTICS
This is the senior professional working level in the Park Planner series. It is a licensed landscape architect who serves as the department technical lead and subject matter expert in park planning. An employee in this class is expected to exercise independent judgment and decision making and is responsible for performing diverse and complex park planning duties, reviewing and approving individual projects, and providing technical guidance to Park Planning staff in accordance with applicable standards, guidelines, and licensing requirements.

This class is distinguished from the Park Planner II position in that it is the senior professional working level in the Park Planning series, possess a landscape architect license, and is responsible for reviewing and approving projects, and managing the more politically sensitive, controversial, and/or technically complex assignments. This class differs from Park Planning Manager by the latter having division head responsibility for managing all park planning and design activities throughout the County.

TYPICAL DUTIES:

Duties may include but are not limited to the following:

Conducts short-term and long-range planning for the regional parks system; makes preliminary field investigations of proposed park, recreation or historic sites to assess suitability and potential usage; determines size, configuration, access modes and basic design; prepares preliminary site plans and estimates costs.

Gathers information and evaluates public demand and usage needs, potential fiscal resources and environmental requirements; prepares land acquisition reports, master plan reports and environmental assessment reports; makes recommendations and presents alternative proposals.

Coordinates land acquisition process with landowners, title companies, appraisers, and related agencies and departments; provides technical advice during negotiations.

Designs parks and park facilities; reviews and interprets aerial photographs and topographic maps.

Prepares, develops and reviews park development plans, environmental documents, design studies, preliminary plans, construction drawings, specifications, cost estimates, documents for public bid or construction, contracts, and associated documents and regulatory permits for park projects.

Participates in or reviews the work of consultants engaged in the preparation of site and facility development plans, environmental documents, landscape plans, grading plans, design details, cost estimates construction drawings, and specifications.

Spot-checks landscape architectural plans in process; consults with staff regarding problems in the development and execution of park projects; stamps and signs construction documents in accordance with Landscape Architecture licensing requirements of the State of California where appropriate; reviews and recommends for approval Notices for CEQA and NEPA compliance.

Supervises the construction of park facilities; reviews and inspects work to ensure conformance with plans, specifications and departmental and county standards.

Prepares and administers grant applications and programs for park acquisition and development; conducts public meetings to present public information and elicit responses; prepares project descriptions and renderings for public presentations; makes presentations to the Board of Supervisors and other public bodies.

Participates with public groups and other County departments and public agencies in preparing long-range and County-wide plans and special studies.

Provides technical support to parks staff; coordinates park improvement work with other phases of development projects; provides technical advice on environmental documents and landscaping maintenance projects including the selection, planting, and preservation of trees, shrubs and grasses; may lead and train others on a project or functional basis.

Acts in conjunction with other divisions as the departmental coordinator for parks accessibility questions, issues or complaints; may participate in the review, coordination, and implementation of the county-wide American's with Disabilities Act Transition Plan with other departments and staff.

May participate in the employee selection process; provides staff feedback to the Park Planning Manager for consideration in the evaluation process; participates in or leads the training of new staff.

KNOWLEDGE, SKILLS, AND ABILITIES:

Considerable knowledge of: park planning terminology, principles and techniques; recreational planning principles; principles, methods and techniques of land use and

environmental and site planning; State and Federal accessibility guidelines; theory, principles, practices, and legal issues of landscape architecture as applied to the preparation of designs, plans, specifications and cost estimates; the technical review procedures and requirements of design studies, permits, and the public bidding process; Landscape Architecture licensing requirements of the State of California as they relate to the requirements of stamping and signing construction drawings.

Working knowledge of: land acquisition, land transfer and zoning principles; public project funding principles and procedures; construction practices and building code requirements; regulatory permits, California Environmental Quality Act (CEQA) and National Environmental Policy Act (NEPA); park development processes and procedures; practices and methods of contract preparation and administration; basic computer applications in MS Office suite; Geographic Information Systems (GIS) and software, such as AutoCAD, typically used in planning and design.

Ability to: serve as a subject matter expert and technical resource; lead and review the work of other park planners on assigned projects; effectively train staff; communicate interpersonally, orally and in writing in an effective and persuasive manner; establish and maintain effective working relationships with other employees, public officials, community groups, regulatory agencies, contractors, consultants, recreational interest groups, and the general public; prepare landscape designs; review completed plans and specifications; inspect projects under construction; prepare clear and concise reports and recommendations; research, gather, organize and analyze information; present recommendations and alternative proposals.

MINIMUM QUALIFICATIONS:

Education and Experience: Any combination of education, training and experience, which would likely provide for possession of stated knowledge and abilities. Normally, graduation from an accredited college or university with a degree in architecture, civil engineering, landscape architecture or related field, and three years experience in park planning, planning, architecture or landscape architecture.

Special Requirement: Possession of a valid Certificate of Registration as a Landscape Architect issued by the California Architects Board.

License: Possession of a valid driver's license at the appropriate level including necessary special endorsements, as required by the State of California to perform the essential job functions of the position.

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Associate Planner

Class Code: L84

Bargaining Unit: SEIU Local 521 - Administrative, Professional, and Technical Unit

COUNTY OF SANTA CLARA
Established Date: Nov 3, 1958
Revision Date: Jan 26, 2016

SALARY RANGE

$46.09 - $55.79 Hourly
$3,687.28 - $4,463.36 Biweekly
$7,989.11 - $9,670.61 Monthly
$95,869.28 - $116,047.36 Annually

DEFINITION:

Under general direction, to provide service to the public and permit applicants, to review and process development applications for cities, agencies and other county departments, to conduct planning studies, feasibility studies, master plans and concept plans, to perform research and analysis of planning data, and to assist in the administration of zoning, planning, or parks and recreation development programs.

DISTINGUISHING CHARACTERISTICS:

The Associate Planner is the full journey level class in the Planner series The Associate Planner is distinguished from the entry level class of Assistant Planner in that the Associate Planner performs professional planning work of moderate difficulty, including coordinating the work on minor projects. The Associate Planner is fully aware of established procedures, regulations and policies, possesses the increased specialized knowledge of the planning field, and the expertise within one or more planning specialties such as community or architectural design, historical resources, agricultural preservation, housing, airport land use, open space, habitat protection or environmental planning. Although Senior Planners and higher level managers assign and review the work of the Associate Planner, Associate Planners receive general supervision when compared to the Assistant Planner.

TYPICAL TASKS:

- Participates in the development and management of planning studies, feasibility studies, master plans and concept plans, coordinates the work on minor projects, and reports on topics, such as land use, housing, historic resources, environmental impacts

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and economic development, in support of new or updated plan policies, regulations or programs;
- Analyzes and reviews land development applications, site plans and building permit applications for completeness and conformance with policies, ordinances, master plans, concept plans, County General Plan, conditions of approval, and State and Federal regulations, prepares conditions of approval where necessary, and takes discretionary action on certain land development projects that are reviewed at the staff level, making required findings;
- Abstracts information from aerial photographs, subdivision maps, census reports, building permits, etc., for analysis in planning studies;
- Analyzes geographic information systems data and creates maps;
- Prepares maps, plans, graphs, and other visual aids;
- Performs field inspections to gather data relevant to planning projects and the development review process and/or to verify that development projects comply with approved plans or to initiate actions necessary to correct violations of regulations or project conditions;
- Prepares recommendations and presents detailed reports on development applications, master plans, concept plans, feasibility studies and other planning-related documents to decision-making bodies such as Board of Supervisors, Parks and Recreation Commission, Planning Commission, Airport Land Use Commission, Historical Heritage Commission, Housing, Land Use, Environment and Transportation Committee, and San Martin Planning Advisory Committee;
- Enters development permit information and permit process workflow data in a central database;
- Tracks application and project expenses and verifies the accuracy of invoices;
- Coordinates staff, agency and community review of development applications, zoning and plan amendments;
- Answers inquiries and provides general information to the public regarding land use projects, permitting procedures, development policies, plans, zoning ordinances and other regulations;
- Provides information to the public regarding the permitting and development review requirements of other County departments such as Fire Marshal's Office, Environmental Health, Land Development Engineering, Geology, Roads and Airports, and Building, and County programs such as Williamson Act, Historic Preservation, and the Santa Clara Valley Habitat Plan;
- Provides customer support for the preparation and processing of routine to moderately difficult development applications, re-zonings, and plan amendments;
- Writes and delivers presentations;
- Participates in meetings, conferences, and workshops;
- Prepares environmental documents in compliance with the California Environmental Quality Act (CEQA) such as Categorical Exemptions, Negative Declarations or Addendum to Environmental Impact Reports;
- Conducts in-depth property specific research including the review of deeds and other legal documents;
- Conducts outreach to community groups, government agencies, developers and the public to encourage participation, resolve problems or obtain input;
- Resolves issues and complaints from the public or neighbors and permit applicants;
- Attends evening meetings;
- May be assigned as a Disaster Service Worker, as required;
- Performs related duties as required.

EMPLOYMENT STANDARDS:

Possession of a Bachelor's degree from an accredited college with a major in planning, architecture, engineering, landscape architecture, natural resources, social science or related

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field;

-AND-

Two (2) years of professional planning experience. A Master's degree in planning may be substituted for two (2) years of the required experience. A Master's degree in a closely related field may be substituted for one (1) year of the required experience.

Possession of a valid California Driver's License prior to appointment and the ability to qualify for and maintain a County Driver's Permit.

Possession of license, registration or certification in a related field, such as American Institute of Certified Planners (AICP), is desirable.

Knowledge of:

- Principles and practices of planning and zoning administration;
- Environmental protection regulations such as California Environmental Quality Act (CEQA), National Environmental Policy Act (NEPA), Clean Water Act, National Historic Preservation Act, and Endangered Species Act;
- State and local laws pertaining to land use such as Williamson Act, Historic Preservation Program, and Santa Clara Valley Habitat Plan;
- Relationship of land use planning to the requirements of other County departments such as Fire Marshal's Office, Environmental Health, Land Development Engineering, Geology, Roads and Airports, and Building;
- Principles of effective customer service;
- Research, report writing and presentation techniques;
- Statistics and math applicable to planning and property development;
- Common computer applications such as word processing, spreadsheet, database management, internet, and geographic information systems.

Ability to:

- Review project descriptions, plans or field conditions and apply policy and code provisions to determine conformance;
- Interpret the zoning ordinance and other policy documents;
- Perform research and analysis of data; Prepare clear and concise reports;
- Communicate technical reports, policies and ordinances to the public and decision-making bodies;
- Build relationships and work respectfully, tactfully and creatively with the public, agencies and staff;
- Speak and write effectively;
- Manage multiple projects and issues effectively and meet firm deadlines;
- Work independently or in a team environment.

Project Manager

Class Code: Y50

Bargaining Unit: County Employees' Management Association

COUNTY OF SANTA CLARA
Established Date: Dec 14, 1993
Revision Date: Feb 8, 2023

SALARY RANGE

$58.92 - $71.62 Hourly
$4,713.28 - $5,729.76 Biweekly
$10,212.11 - $12,414.48 Monthly
$122,545.28 - $148,973.76 Annually

DEFINITION:

Under general direction, to manage the planning, development, execution, and implementation of special projects.

DISTINGUISHING CHARACTERISTICS:

The Project Manager classification has direct managerial and supervisory responsibility for the administrative and operational activities of special projects for the agency and/or department. Responsibilities include program development, defining project guidelines, tracking and evaluation of regulatory information, legislative review, communication with other agencies, management of centralized system contracts, and performance of quality assurance auditing.

The Project Manager classification is distinguished from the Program Manager classification series in that the Project Managers is typically responsible for a discreate project where as the Program Managersperform general managerial and supervisory duties in relation to planning, organizing, directing, and controlling activities and/or staff of County programs.

TYPICAL TASKS:

The following are the duties performed by employees in this classification. However, employees may perform other related duties at an equivalent level. Each individual in the classification does not necessarily perform all duties listed.

- Plans and oversees projects of high complexity to completion;
- Prepares, monitors, and manages project budgets;

- Proposes and constructs special projects and activities aimed at enhancing the effective use and control of resources and technology;
- Works with project leadership and stakeholders to identify and establish project goals, scope, objectives, priorities, timelines, schedules, resources, and deliverables;
- Manages the analysis of procedures and systems to assess and improve the operational execution of special projects;
- Advises on project feasibility and recommends solutions;
- Formulates strategies and establishes priorities to achieve objectives;
- Monitors and creates, as needed, tracking tools, schedules, reports, procedures, and processes to support successful project implementation;
- Interviews, selects, hires, trains, supervises, evaluates, and manages staff;
- Identifies and defines system resources, develops project plans, budgets, and work schedules for the implementation of new systems and/or application of enhancements;
- Monitors and evaluates the performance of vendors and ensures that contracts and agreements are met and problems are dealt with on a timely basis;
- Evaluates and makes recommendations relating to workflow and staffing patterns and assists in the establishment of performance standards and workload measures;
- Participates in meetings and serves as liaison with County departments and stakeholders, and represents the project in contacts with the public and private agencies and concerned community groups and organizations;
- Tracks pending legislative developments, reviews and/or suggests modifications on legislative and regulatory proposals;
- Assists with the development and management of contracts, data sharing agreements, and other legal, regulatory, and compliance activities, in coordination with County Counsel and other County partners;
- Conducts formal review at project completion to confirm acceptance and documents lessons learned for future reference and learnings;
- Conducts special studies and investigations in assigned program area;
- Prepares and presents project status updates to internal and/or external partners and stakeholders, including detailed status reports and correspondences, as requested;
- Assists with determining funding needs and obtaining external funding when necessary, through grants and/or contracts;

- Utilizes established project standards and procedures, and contributes to the development and continued improvement of project management tools;
- May coordinate with staff around epidemiology and surveillance, public health informatics, performance management and quality improvement, research, and evaluation activities;
- May be assigned as a Disaster Service Worker (DSW), as required*;
- Performs other related duties, as required.

EMPLOYMENT STANDARDS:

Sufficient education, training, and experience to demonstrate the ability to perform the above tasks, plus the possession and direct application of the following knowledge and abilities:

Training and Experience Note: The knowledge and abilities are attained through possession of a Master's Degree or higher preferably in Business Administration, Public Administration, Social Work, Public Policy, Public Health, Health Administration, Sociology, Project Management, or closely related field.

and

Three (3) years of full-time project management, analytical, administrative, supervisory, and/or management experience .

Possession of a Project Management Professional (PMP) certification may substitute for one (1) year of the required experience.

Knowledge of:

- Principles and practices of project development, implementation, management, and evaluation;
- Principles of governmental organization, administration, financing, and budgeting;
- Federal and State legislative process;
- Statistical and research methods;
- Principles and practices of personnel management, training, and supervision;
- Principles and practices of change management;
- Techniques for organizing, facilitating, and motivating groups on building consensus;
- English usage, style, grammar, punctuation, and spelling:

- Common computer systems and applications.

Ability to:

- Analyze administrative and management problems, reach practical and logical conclusions, and put effective changes into practice;
- Understand, interpret, and apply provisions of Federal, State, and local legislation, rules, and regulations pertinent to the administration of programs and policies;
- Communicate effectively, both orally and in writing, with people of diverse backgrounds and cultures;
- Gather, interpret, and present a variety of management analysis data;
- Plan and manage a program which has agency-wide impact;
- Establish and maintain effective working relationships with those contacted in the course of work, at all levels, including colleagues, the public, and representatives of other agencies;
- Manage and supervise personnel and budgetary resources;
- Manage complex projects with interdisciplinary teams;
- Demonstrate skills in facilitation, negotiation, and problem resolution;
- Work with multiple project stakeholders from other County agencies, community partners, and community groups;
- Manage contracts, budgets, and grants;
- Utilize established project standards, policies, and procedures to contribute to the development and continuous improvement of project management tools;
- Work with multiple projects and schedules.

Planner

Class Code: PLNR

Bargaining Unit: AFSCME Local 2428

EAST BAY REGIONAL PARK DISTRICT
Established Date: May 16, 1976
Revision Date: Nov 27, 2019

SALARY RANGE

$51.80 - $58.62 Hourly
$8,417.50 - $9,525.75 Monthly

GENERAL FUNCTION:

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

Under general supervision, functions as technical lead or support staff in the preparation of park land use plans, California Environmental Quality Act (CEQA) documents, and resource evaluations for park, trail and open space projects; helps implement the planning goals of the District's Master Plan; and performs related duties as assigned.

ESSENTIAL FUNCTIONS:

The following duties are typical for this classification. Incumbents may not perform all of the listed duties and/or may be required to perform additional or different duties from those set forth below to address business needs and changing business practices.

- Helps guide local planning and land use decisions
- Assists in securing regulatory agency permits
- Performs project scoping and scheduling
- Visits field sites
- Facilitates inter-departmental coordination
- Prepares clear and concise planning and/or CEQA documents
- Posts public notifications
- Organizes facilities and equipment for public meetings
- Compiles comments from public review periods
- And prepares materials for review by the General Manager and the District's Board of Directors
- Gathers, analyzes and interprets data related to local planning action referrals and other local agency documents
- Selects and monitors outside consultants in the preparation of technical reports
- Presents District positions and attends public hearings

- Presents District interests
- And supports objectives in a wide range of community, environmental and public forums
- Conducts research on park resources using documents, surveys, plans and maps
- And prepares reports and proposes actions
- Communicates with developers and public agencies
- Negotiates, coordinates and secures development concessions in the form of public open space dedications, public easements and environmental mitigations
- Prepares long range plans, special reports of studies, memos, working maps, and displays, as needed
- Assists in providing guidance and direction to other staff, as needed
- And performs related duties as assigned.

MINIMUM QUALIFICATIONS:

Any combination of education and experience that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Education: A Bachelor's degree from an accredited college or university with major course work in planning, natural resource management, or a related field,

AND

Experience: One year of experience dealing with CEQA and/or regulatory agency requirements.

License or Certificate: Possession of a valid Class C California Driver's License is a condition of initial and continued employment in this classification.

KNOWLEDGE, SKILLS AND ABILITIES:

The following generally describes the knowledge and ability required to enter the job and/or be learned within a short period of time in order to successfully perform the assigned duties.

Knowledge of:

- Federal, state, and local government planning processes and regulatory agency requirements
- Including CEQA, NEPA, Section 106, and endangered species acts
- Excellent written and verbal communication
- Climate change and its effects
- Office procedures, methods, and equipment including computers
- And applicable software applications such as word processing, spreadsheets, and databases.

Ability to:

- Prepare basic graphic and map displays

- Meet deadlines
- Prioritize work
- And coordinate several activities
- Identify basic plants and animals
- Deliver public presentations
- Coordinate interagency and interdepartmental meetings
- Operate office equipment
- Including computers and supporting word processing, spreadsheet, and database applications
- Communicate clearly and concisely, both orally and in writing
- Establish and maintain effective working relationships with those contacted in the course of work at all levels,
- Including a culturally diverse general public, with a focus on quality service to internal and external customers.

CONDITIONS OF EMPLOYMENT

- Must pass a Level 1 Background Check.
- May be required to attend public hearings and other meetings which may be scheduled outside of normal work hours.

ADDITIONAL INFORMATION

REPORTS TO: Chief, manager, supervisor, or designee.
SUPERVISES: This is not a supervisory class

HISTORICAL INFORMATION

Employment Category: AFSCME, Local 2428
Approved by Board: May 15, 1976
Revision Approved by General Manager: December 7, 2000
Replaces "Park Planner I"
Revision Approved by General Manager; December 30, 2014
Revision Approved by General Manager: November 15, 2019

Senior Planner

Class Code: SPLN

Bargaining Unit: AFSCME Local 2428

EAST BAY REGIONAL PARK DISTRICT
Revision Date: Aug 13, 2020

SALARY RANGE

$57.19 - $64.69 Hourly
$9,912.93 - $11,212.93 Monthly

GENERAL FUNCTION:

Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are not intended to reflect all duties performed within the job.

GENERAL FUNCTION:
Under direction, leads and conducts varied planning projects in planning, environmental review or regional trails; interfaces with outside agencies in order to advocate and protect the Park District interests; interprets and implements the planning goals, policies and capital improvement projects of the Park District's Master Plan; and performs related duties as assigned.

CLASS CHARACTERISTICS:
The Senior Planner is the second level in the professional planner series and provides lead direction. This includes assigning tasks, monitoring progress, reviewing results, and providing input for performance evaluations. It is distinguished from the higher-level classification of Principal Planner, in that the latter has responsibility for the overall function of the Planning Unit and all personnel functions such as hiring and discipline. It is further distinguished from the lower-level classification of Planner in that the latter performs tasks to support the planning unit.

ESSENTIAL FUNCTIONS:

The following duties are typical for this classification. Incumbents may not perform all of the listed duties and/or may be required to perform additional or different duties from those set forth below to address business needs and changing business practices.

Planning or Environmental Review

- Reviews assigned projects and develops project methods and procedures;
- Leads project teams, working collaboratively and professionally with team members and stakeholders;
- Responds to public inquiries and department staff concerning state and federal planning and environmental laws;

ATTACHMENT 1

- Manages consultants in the preparation of studies, plans, designs and cost estimates for projects;
- Independently evaluates the environmental impacts of capital and maintenance projects;
- Coordinates with resource regulatory agencies;
- Represents the Park District interests and supports Park District objectives in a wide range of community, environmental and public forums;
- Assists in the preparation of grant applications related to land use plans and capital projects;
- Ensures legally mandated requirements are adhered to for plans and documents;
- Gathers, analyzes, and interprets data relating to local planning action referrals, general plans, specific plans, development proposals and environmental policy documents;
- Conducts site visits and field investigations as required;
- Makes recommendations on land use planning issues;
- Conducts research on park resources, prepares comprehensive reports, and recommends courses of action;
- Selects and monitors outside consultants;
- Prepares environmental impact documents and land use plans;
- Provides follow-up coordination in the design and construction phase of land use plans;
- Prepares cost estimates for capital projects within the plan;
- Monitors the implementation of environmental mitigation measures;
- Presents Park District positions in written responses and at public hearings;
- Communicates on an ongoing basis with developers and public agencies;
- Negotiates, coordinates and secures development concessions in the form of public open space dedications, public access easements and environmental mitigations;
- Prepares long range plans, special reports and studies, correspondence, cost estimates, working maps and displays as required;
- Develops content for social media platforms on assigned projects;
- Performs related duties as assigned.

Regional Trails

- Conducts varied trail related planning projects, including feasibility studies and local and regional trail planning efforts;
- Manages projects through construction utilizing staff and/or outside contractors;
- Leads project teams, working collaboratively and professionally with team members and stakeholders;
- Responds to public inquiries and department staff concerning state and federal trail planning standards and best management practices;
- Assists in the preparation of grant applications related to land use plans and capital projects;
- Ensures legally mandated requirements are adhered to for plans and documents;
- Serves as liaison to outside agencies, trail users and other community groups;
- Represents Park District interests and supports Park District objectives in a wide range of community, environmental and public forums;
- Coordinates and provides instruction at Park District training courses;
- Works to incorporate the Park District's Master Plan regional trails into local and regional bicycle and pedestrian plans;
- Plans and implements the Ivan Dickson Volunteer Trail Maintenance Program;
- Gathers, analyzes, and interprets data relating to local trail related planning actions, general plans, specific plans, development proposals and environmental policy documents, as assigned and reviews and comments to ensure the Park District's interests are protected;
- Analyzes data, creates maps, and communicates ideas and/or concerns using Global Positioning System (GPS) and Geographic Information System (GIS);
- Conducts site visits and field investigations as required;
- Selects and monitors outside consultants;
- Ensures trail projects to be owned, operated or managed by the Park District, are designed consistent with Park District standards;

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- Negotiates, coordinates and secures development concessions in the form of public open space dedications, public access easements and environmental mitigations;
- Performs related duties as assigned.

MINIMUM QUALIFICATIONS:

Any combination of education and experience that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Education: A Bachelor's degree from an accredited college or university with major course work in city or regional planning, landscape architecture, or a related field;

AND

Experience: Three years of experience in land use planning, including work with public agencies and experience with preparation and analysis of plans and environmental documents;

AND

License or Certificate: Possession of a valid Class C California Driver's License is a condition of initial and continued employment in this classification.

KNOWLEDGE, SKILLS AND ABILITIES:

The following generally describes the knowledge and ability required to enter the job and/or be learned within a short period of time in order to successfully perform the assigned duties.

Knowledge of:

- Principles of lead supervision and training;
- Principles and practices of project management and design;
- Federal, state, and local planning and environmental laws, regulations, rules, and acts;
- Processes and best practices of regulatory agency permitting;
- Environmental evaluation procedures;
- Trail planning, design concepts, and trail maintenance;
- Written and verbal communication to deliver public presentations, coordinate interagency, and interdepartmental meetings, and facilitate discussions with key internal and external stakeholders;
- Local government planning processes;
- Office procedures, methods, and equipment including computers and applicable software applications such as digital imagery, GIS, word processing, spreadsheets, and databases.

Ability to:

- Manage capital projects and administer contracts;
- Oversee support staff on a project basis;
- Lead, train, and motivate staff;
- Facilitate meetings and negotiate outcomes;

- Coordinate multiple activities simultaneously, set priorities, and meet deadlines;
- Communicate graphically;
- Organize and create maps and presentation graphics;
- Facilitate resolution of issues and develop alternatives;
- Prepare requests for proposals, negotiate contract terms, select consultants, ensure compliance, monitor project budgets, and track project results;
- Gather, interpret, analyze, evaluate and present a range of data;
- Work with a high degree of independence to perform a variety of complex analytical research in developing recommendations;
- Prepare clear and concise planning and environmental documents and reports;
- Operate office equipment including computers and supporting word processing, spreadsheet, and database applications;
- Communicate clearly and concisely, both orally and in writing;
- Establish and maintain effective working relationships with those contacted in the course of work at all levels, including a culturally diverse general public, with a focus on quality service to internal staff and external customers.

CONDITIONS OF EMPLOYMENT

- Must pass a Level 1 Background Check.
- May be required to work occasional evenings and/or weekend hours for meetings or presentations

ADDITIONAL INFORMATION

REPORTS TO: Chief, manager, supervisor, or designee.
SUPERVISES: May provide lead direction to support staff and/or volunteers.

The East Bay Regional Park District is an Equal Opportunity Employer that values and respects a diverse workforce and community. It is committed to promoting an equitable and inclusive workspace that is welcoming to all. Applicants from all backgrounds and life experiences are encouraged to apply. All qualified applicants will receive consideration for employment.

HISTORICAL INFORMATION

Employment Category: AFSCME, Local 2428
Replaces “Park Planner II”, Adopted by Board: 5/15/76
Revision Adopted by General Manager: December 18, 2003
Salary Revised per Joint Equity Committee Effective 1/1/04
Revision Approved by General Manager: 2/26/07
Revision Approved by General Manager: 4/25/07
Replaces “Senior Park Planner and Senior Planner”
Revision Approved by General Manager: 12/30/2014
Revision Approved by General Manager: August 13, 2020

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Assistant Planner

Class Code: 29560

COUNTY OF SACRAMENTO
Established Date: Nov 20, 2014
Revision Date: Feb 22, 2015

SALARY RANGE

$37.55 - $45.64 Hourly
$6,533.70 - $7,941.36 Monthly
$78,404.40 - $95,296.32 Annually

DEFINITION:

Under general supervision, performs analytical planning and environmental work in the administration and development of community and general plans, zoning regulations and environmental documents; explains the planning program, policies, local ordinances and State and Federal regulations to the public.

DISTINGUISHING CHARACTERISTICS:

This class is the journey and first professional level class in the Planner series. Incumbents in this class perform complex and professional tasks in providing the public with information on land use policy and regulations, determining the effects of proposed activities on the environment, preparing major sections of the general plan or community plans, preparing environmental documents and/or processing land development plans.

Incumbents in this class receive direct supervision from an Associate Planner or other higher level personnel. This class is distinguished from the higher class of Associate Planner in that this class does not perform supervisory responsibilities or the more technically complex assignments with greater independence. This class is distinguished from the lower level class of Planning Technician in that the latter provides specialized paraprofessional and technical support for planning and environmental activities.

EXAMPLES OF DUTIES, KNOWLEDGE, AND ABILITIES:

Duties may include, but are not limited to, the following:

• Reviews proposed development or public infrastructure project plans and/or applications for variance and other development permits and approvals, conditional use, subdivisions, design review, etc. for consistency with the general plan, compliance with local ordinances, regional and state requirements, and/or environmental conditions and impacts.
• Processes business licenses, certificates of compliance, oil and gas drilling permits.
• Researches, compiles, analyzes, and interprets information and data in the preparation of environmental documentation and special reports.
• Contacts various public agencies to gather information pertinent to specific projects or environmental studies; evaluates and comments upon reports submitted by other

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governmental or private organizations.
• Conducts field investigations of project sites to gather facts and assure compliance with approval conditions; takes photographs; records field notes and other data from a variety of sources.
• Applies statistical formulas in the analysis of demographic, economic, environmental, and other data; provides data as requested for various planning studies, programs or special reports.
• Collects and analyzes collected project data for studies of human, physical, natural, economic and/or governmental resources.
• Assists in the preparation of various elements to the General Plan, community plans, ordinances and other policies and procedures.
• Prepares initial studies, negative declarations and other environmental documents in accordance with the California Environmental Quality Act (CEQA) and/or National Environmental Policy Act (NEPA); reviews consultant prepared environmental documents.
• Advises project proponents of requirements applicable to proposed projects and assists in developing plans to meet these requirements.
• Assists with the development and implementation of measures to avoid, minimize and/or mitigate potentially adverse environmental impacts; prepares Mitigation Monitoring and Reporting Program (MMRPs); conducts field investigation and reviews site plans for compliance with MMRP and provides reports.
• Responds to public inquiries regarding ordinances, laws, regulations, policies, and procedures governing land use and environmental characteristics of projects and environmental conditions.
• Presents proposals and recommendations to local planning committees, councils, public agencies, and community groups.
• Composes comprehensive staff reports for various hearing bodies; prepares correspondence and other documents to County staff, consultants, developers, other governmental agencies and the public.
• Gathers and assembles information for the preparation of charts, graphs and other illustrative materials for a variety of staff/project reports and support documents.
• Performs related duties as assigned.

EMPLOYMENT STANDARDS

Knowledge of:
• Applicable federal, state and local laws, codes, ordinances, regulations, policies, and procedures related to urban planning, environmental regulations, and community development
• Various aspects of human ecological relationships
• Principles, practices, and techniques of urban and regional planning
• Principles and practices of governmental planning with particular reference to urbanizing areas
• Trends and statistics affecting community planning
• The State Planning, Zoning and Land Use laws, Subdivision Map Act, California Environmental Quality Act, National Environmental Policy Act, and pertinent County ordinances such as the Zoning Code
• Statistics and graphic presentation techniques
• Basic principles of urban planning
• Basic research and statistical methods and procedures
• Principles, practices and techniques of drafting and graphic design
• Procedures for gathering land use data
• Public speaking and presentation techniques
• Office procedures, methods, and equipment including computers and applicable software applications such as word processing, spreadsheets, databases, and other specialized applications related to area of assignment
• English usage, spelling, grammar, and punctuation

Ability to:
• Collect, compile, analyze and interpret data pertaining to planning, environmental, land use and zoning issues
• Prepare technical and statistical documents

- Prepare required maps and other graphical material
- Evaluate statistical data and present facts and conclusions
- Develop and maintain cooperative, effective working relationships with the public, community groups, and other government agencies
- Communicate clearly and concisely, both verbally and in writing
- Make effective presentations and respond to questions from various groups, including boards, committees, and the public
- Interpret and apply applicable federal, state, and local laws, codes, regulations, policies and procedures
- Keep accurate records and prepare clear and concise reports
- Formulate options and make recommendations based on data and information collected
- Apply customer service skills, including the identification of customer needs and follow up to ensure customer commitments have been met
- Use current technologies, tools and equipment to achieve program goals

MINIMUM QUALIFICATIONS:

Either: 1. Three years of full-time paid experience employed by the County of Sacramento in the class of Planning Technician.

Or: 2. A Bachelor's Degree or higher from an accredited college or university in public administration, ecological studies, environmental planning and management, environmental studies, geography, natural resources, urban or regional planning or other field closely related to the intent of the class.

Or: 3. Four years of full-time paid professional experience in environmental, urban and/or regional planning which must have included performing one of the following kinds of planning activities associated with a planning agency: comprehensive, regional, area, or community planning; public infrastructure environmental analysis; plan/proposal review; general plan amendments; CEQA/NEPA document preparation; zoning; land division; housing administration; information services; urban renewal; or planning administration.

Note: Related fields above may include archaeology, anthropology, architectural history, biology, botany, business administration, climatology, economics, engineering, geology, historic preservation, hydrology, political science, range management, recreation administration (outdoor resource management), watershed management, and wildlife management.

GENERAL QUALIFICATIONS

Criminal History and Background Checks:
The County may access criminal history information on candidates who have accepted a conditional offer of appointment for this class consistent with the provisions of Board of Supervisors Resolution No. 82-602, Personnel Policies and Procedures B-5, and applicable federal and state laws. The County shall not consider for employment any candidate who has been convicted of a felony or misdemeanor that relates to or impacts the candidate's ability to perform the job duties of this class unless it is determined that mitigating circumstances exist. For purposes of accessing criminal history information, the candidate will be fingerprinted. A subsequent arrest notification may be obtained.

The County may also conduct a background check on the candidate prior to appointment to a position within this class. The background check may include personal and professional reference checks, credit history checks where authorized by Labor Code section 1024.5, Social Security Number verification, professional license/registration verification, military service information and driving history. Information obtained in the course of this background check will be considered by the appointing authority in the selection process. In obtaining such information, the County will comply with applicable consent and disclosure practices in

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the Fair Credit Reporting Act and the California Investigative Consumer Reporting Agencies Act.

License Requirement:
A valid California Driver License, Class C or higher is required at the time of appointment. Failure to obtain or maintain the appropriate California Driver License may constitute cause for personnel action in accordance with Civil Service Rules or applicable bargaining agreement. Individuals who do not meet this requirement due to disability will be reviewed on a case-by-case basis.

Physical Requirements:
While most work will be in an office setting, incumbents will occasionally visit sites of proposed development, construction sites, etc. and be required to:
• Walk and stand for long periods of time.

Individuals who do not meet these requirements due to disability will be reviewed on a case-by-case basis.

Working Conditions:
While most work will be in an office setting, incumbents will occasionally visit sites of proposed development, construction sites, etc. and be required to:
• Work outside in all types of climatic conditions including inclement, very hot and/or cold weather.
• Work on rough, uneven terrain.
• Work in loud or noisy areas.
• Work near vehicular traffic.
• Work around dirt, dust, fumes and/or odors.
• Work around machinery and equipment with moving parts.
• Work in potentially hazardous areas.

PROBATIONARY PERIOD AND CLASS HISTORY INFORMATION:

Six (6) months

Adopted: 2/22/15
Revised:
Retitled:
Class Code: 29560
Schematic Code: 2----C
EEO Code: 42
Rep Unit: 026

CLASS SPEC TITLE 6:

Other classes in the Planner series include: Planning Technician, Associate Planner, Senior Planner, and Principal Planner

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Associate Planner

(https://agency.governmentjobs.com/sacramento
action=specbulletin&ClassSpecID=1025828&he

SUBSCRIBE

Class Title
Associate Planner

Class Code
29561

Salary
$94,335.84 - $114,672.96 Annually

DEFINITION BENEFITS

Definition

Under direction, supervises, assigns, and/or reviews the work of staff responsible for the administration and development of community and general plans, zoning regulations and environmental documents; explains the planning program, policies, local ordinances and State and Federal regulations to the public; ensures work quality and adherence to established policies and procedures; and performs the more technical and complex tasks relative to the assigned area of responsibility.

Distinguishing Characteristics

This class is the supervisory class in the Planner series. Incumbents in this class are expected to work under minimal management supervision and instruction, and to exercise considerable independent judgment and initiative. Incumbents supervise and/or coordinate the work of professional, technical and other staff performing tasks related to preparing major sections of the general plan or community plans, implementing land use policy and regulations, determining the effects of proposed activities on the environment, preparing environmental documents and/or processing land development plans. Incumbents in this class may also function as technical specialists but not directly supervise other workers.

Incumbents in this class report to a Senior Planner or other management personnel. This class is distinguished from the higher class of Senior Planner in that the latter is the management level class responsible for the more complex work assignments and/or managerial responsibility. This class is further distinguished from the lower class of Assistant Planner by the supervisory responsibilities, the technical complexity of the assignments received, and/or the greater independence with which the incumbent is expected to operate.

Examples of Duties, Knowledge, and Abilities

Duties may include, but are not limited to, the following:

• Plans, prioritizes, assigns, supervises, reviews and participates in the work of staff responsible for the preparation and administration of general plan amendments, subdivision, land use and zoning regulations, community plans, planning staff reports and environmental documents.

• Coordinates and reviews the work plan for assigned functions, services, and activities; assigns work activities and projects; monitors work flow; reviews and evaluates work products, methods and procedures; meets with staff to identify and resolve problems; ensures work is performed accurately and that timelines are met; ensures compliance with established policies, procedures, and related regulations.

• Assists with interviewing and selecting assigned personnel.

• Provides and/or coordinates staff training in accordance with established policies and procedures.

• Works with employees to correct deficiencies; recommends and/or implements discipline and termination procedures.

• Assists in identifying opportunities for improving service delivery methods and procedures; identifies resource needs; reviews with appropriate management staff; implements improvements.

• Responds to and resolves routine customer inquiries and complaints.

• Performs the more technical and complex tasks of the work unit, which may include such duties as selecting, managing and administering the services of consultants; reviewing work products for technical accuracy and compliance with local, State and Federal regulations; overseeing budget and financial records.

• Reviews large and/or complex land development projects including subdivisions, conditional use, variance and other development permits and approvals, environmental permitting applications, design reviews, development agreements, rezoning and General Plan amendments; coordinates the processing of submitted applications; reviews environmental impact reports; facilitates the preparation of documents such as the County General Plan, environmental forms, general plan elements, specific plans and related products, and includes preparation and review of environmental impact reports and/or planning reports for major, controversial projects.

• Develops measures to avoid, minimize and/or mitigate potentially adverse environmental impacts; prepares and ensures implementation of Mitigation Monitoring and Reporting Programs (MMRP) and monitors compliance.

• Monitors the activities of maintenance and construction personnel, and consultants; provides training on measures and Best Management Practices (BMPs) to ensure avoidance and minimization of environmental impacts; serves as a biological monitor over such activities in the vicinity of sensitive habitat or special status species protected by the California and Federal Endangered Species Act.

• Participates in the development and implementation of goals, objectives, policies and procedures for assigned area of responsibility; recommends and implements policies and procedures to ensure compliance with appropriate laws, ordinances, and codes.

• Reviews project and program budgets; submits budget recommendations; monitors expenditures.

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• Gathers and compiles information and illustrative materials on operations and activities for a variety of staff/project reports; composes correspondence and other documents to County staff, consultants, developers, other governmental agencies and the public.

• Represents the department at inter-agency meetings, conferences and public hearings related to planning and environmental issues; works cooperatively with local, regional, state, and federal agencies.

• Performs related duties as assigned.

EMPLOYMENT STANDARDS

Knowledge of:

• Principles and practices of supervision, discipline, leadership, mentoring, and training

• Team dynamics and team building

• Applicable federal, state, and local laws, codes, ordinances, regulations, policies, and procedures related to urban planning, environmental regulations, and community development

• Principles and practices of governmental planning with particular reference to urbanizing areas

• Trends and statistics affecting community planning

• Procedures for gathering land use and environmental data

• The State Planning, Zoning and Land Use laws, Subdivision Map Act, California Environmental Quality Act, National Environmental Policy Act, and pertinent County ordinances such as the Zoning Code

• Statistical and graphic presentation skills

• Principles and techniques of implementing and developing project-level work plans and budgets

• Public speaking and presentation techniques

• Office procedures, methods, and equipment including computers and applicable software applications such as word processing, spreadsheets, databases, and other specialized applications related to area of assignment

• English usage, spelling, grammar, and punctuation

Ability to:

• Select, supervise, train, and evaluate staff

• Investigate and resolve disciplinary issues

• Work independently, prioritize work, coordinate activities and meet critical deadlines

• Monitor and interpret budgets and other financial documents

• Collect and compile a variety of data and information

• Plan, coordinate, assign, and review the work of subordinate staff

• Develop and maintain cooperative, effective working relationships with subordinates and the public

• Communicate clearly and concisely, both verbally and in writing

• Prepare, negotiate and administer contracts

• Interpret and apply applicable federal, state, and local laws, codes, regulations, policies and procedures

• Apply customer service skills, including the identification of customer needs and follow up to ensure customer commitments have been met

• Use current technologies, tools, and equipment to achieve program goals

Minimum Qualifications

Either: 1. One year of full-time paid experience employed by the County of Sacramento in the class of Assistant Planner.

Or: 2a. One year of full-time paid professional experience in environmental, urban and/or regional planning which must have included performing analytical duties in one of the following kinds of planning activities associated with a planning agency: comprehensive, regional, area, or community planning; public infrastructure environmental analysis; plan/proposal review; general plan amendments; CEQA/NEPA document preparation; zoning; land division; housing administration; information services; urban renewal; or planning administration.

And

2b. A Bachelor's Degree or higher from an accredited college or university in public administration, ecological studies, environmental planning and management, environmental studies, geography, natural resources, urban or regional planning or other field closely related to the intent of the class.

Or: 3. Five years of full-time paid professional experience in environmental, urban and/or regional planning which must have included performing analytical duties in one of the following kinds of planning activities associated with a planning agency: comprehensive, regional, area, or community planning; public infrastructure environmental analysis; plan/proposal review; general plan amendments; CEQA/NEPA document preparation; zoning; land division; housing administration; information services; urban renewal; or planning administration.

Note: Related fields above may include archaeology, anthropology, architectural history, biology, botany, business administration, climatology, economics, engineering, geology, historic preservation, hydrology, political science, range management, recreation administration (outdoor resource management), watershed management, and wildlife management.

GENERAL QUALIFICATIONS

Criminal History and Background Checks:

The County may access criminal history information on candidates who have accepted a conditional offer of appointment for this class consistent with the provisions of Board of Supervisors Resolution No. 82-602, Personnel Policies and Procedures B-5, and applicable federal and state laws. The County shall not consider for employment any candidate who has been convicted of a felony or misdemeanor that relates to or impacts the candidate's ability to perform the job duties of this class unless it is determined that mitigating circumstances exist. For purposes of accessing criminal history information, the candidate will be fingerprinted. A subsequent arrest notification may be obtained.

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The County may also conduct a background check on the candidate prior to appointment to a position within this class. The background check may include personal and professional reference checks, credit history checks where authorized by Labor Code section 1024.5, Social Security Number verification, professional license/registration verification, military service information and driving history. Information obtained in the course of this background check will be considered by the appointing authority in the selection process. In obtaining such information, the County will comply with applicable consent and disclosure practices in the Fair Credit Reporting Act and the California Investigative Consumer Reporting Agencies Act.

License Requirement:

A valid California Driver License, Class C or higher is required at the time of appointment. Failure to obtain or maintain the appropriate California Driver License may constitute cause for personnel action in accordance with Civil Service Rules or applicable bargaining agreement. Individuals who do not meet this requirement due to disability will be reviewed on a case-by-case basis.

Physical Requirements:

While most work will be in an office setting, incumbents will occasionally visit sites of proposed development, construction sites, etc. and be required to:

• Walk and stand for long periods of time.

Individuals who do not meet these requirements due to disability will be reviewed on a case-by-case basis.

Working Conditions:

While most work will be in an office setting, incumbents will occasionally visit sites of proposed development, construction sites, etc. and be required to:

• Work outside in all types of climatic conditions including inclement, very hot and/or cold weather.

• Work on rough, uneven terrain.

• Work in loud or noisy areas.

• Work near vehicular traffic.

• Work around dirt, dust, fumes and/or odors.

• Work around machinery and equipment with moving parts.

• Work in potentially hazardous areas.

Probationary Period and Class History Information

Six (6) months

Adopted: 2/22/15

Revised:

Class Code: 29561

Schematic Code: 2----C

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EEO Code: 42

Rep Unit: 034

Other Class Spec Title 1

Other classes in the Planner series include: Planning Technician, Assistant Planner, Senior Planner, and Principal Planner

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COUNTY OF SAN MATEO
Revision Date: Jan 9, 2001

Planner II

Class Code: R050

Bargaining Unit: AFSCME: Planning(A05)

SALARY RANGE

$42.74 - $53.42 Hourly
$3,419.20 - $4,273.60 Biweekly
$7,408.27 - $9,259.47 Monthly
$88,899.20 - $111,113.60 Annually

DEFINITION:

Under general supervision, research and analyze planning data, conduct planning studies, prepare environmental documents, and assist in land use and zoning administration for current and future community projects.

DISTINGUISHING CHARACTERISTICS
Planner I is the entry level in the Planner series. Under immediate supervision, incumbents learn how to apply their professional training to a work production environment and how to perform the simplest and least complex planning review activities. This class is flexibly staffed with Planner II and incumbents may advance to the higher level after gaining experience and demonstrating proficiency in the work.

Planner II is the full experienced journey level in the Planner series. Under general supervision, incumbents perform a full range of planner activities and exercise substantial independence and initiative in carrying out their assignments. This class is flexibly staffed with Planner III and incumbents may advance to the higher level after gaining experience and demonstrating proficiency in the work.

Planner III is the advanced journey level in the Planner Series. Under direction, incumbents carry out the major and more complex land use projects in all sections of the Division. Incumbents provide direction to other professional staff on projects and operate with independence within the parameters of legislative and divisional policy.

EXAMPLES OF DUTIES:

Duties may include, but are not limited to, the following:

- Gather, compile, and analyze statistical data; study trends in land use, demographics and environmental impacts.
- Conduct studies, compile data and information and prepare reports on land use, population, environmental impacts, transportation, ordinance amendments and other planning subjects.
- Make field surveys and investigate related planning and zoning projects and inquiries.
- Maintain automated historical records.
- Prepare reports on data collected to support recommendations on zoning, transportation, and other land use projects.
- Prepare recommendations and assist in presentations to the Planning Commission, Board of Supervisors, and public agencies.
- Prepare or assist in revising maps, charts, graphs and other visual aids including departmental brochures and publications on land use and policies.
- Act as liaison and consultant with the public, other agencies, department and/or sections of the Planning and Building Division.
- Attend public hearings, task forces, and other land use related meetings.
- May act as lead in the absence of the supervisor and on large projects.
- May act as supervisor in his/her absence.
- Perform related duties as assigned.

QUALIFICATIONS:

Note: The level and scope of the knowledge, skills and abilities listed below are related to job duties as defined under Distinguishing Characteristics.

Knowledge of:

- The organization of local government and concepts of public administration.
- Principles, practices and trends in urban and regional planning, including physical, social and economic factors.
- Codes, ordinances and laws related to planning, zoning, environmental resource protection, and subdivisions.
- Basic computer operations.
- Basic lead and supervisory principals and practices.
- Research and statistical methods and sources of data.
- Mathematical principals, tools and practices used in determining density and structural floor area.
- Symbols, language and techniques used in planning, drafting, mapping and the basic principles involved in interpreting aerial photography.

Skill/Ability to:

- Work cooperatively and effectively with the public, co-workers and individually and as a member of a professional and technical team and individually.
- Recognize the key importance of customers, their unique situation and the department's and division's relationship with the customer in problem resolution and information giving situations.
- Produce comprehensive, clear and concise reports, memos, letters, staff reports and major studies which are accurately researched, focused on essential information, reflect an appropriate level of analysis, and demonstrate objectivity.
- Make concise and understandable presentations, manage related discussions, facilitate decision-making, formulate alternatives, and summarize and respond to comments effectively.
- Make valid conclusions and appropriate alternative recommendations.
- Explain policy and procedures to the public and staff.
- Facilitate problem resolution.
- Operate and retrieve information using a computer.
- Adapt to changing situations even under pressure.
- Conduct research including gathering, interpreting and presenting data; reach conclusions, develop defensible recommendations and formulate feasible policy and regulations.
- Interpret and explain maps, charts and tables; coordinate the preparation of a wide range of visual aids which clearly illustrate issues concepts, and programs.

Education and Experience:
Any combination of education and experience that would likely provide the required knowledge, skills and abilities is qualifying. A typical way to qualify is:

Planner I: Bachelor's degree in Planning or a closely related field.

Planner II: Two years of professional planning experience.

Planner III: Three years of professional planning experience.

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Capital Projects Manager I

Class Code: N001

Bargaining Unit: AFSCME: Planning(A05)

COUNTY OF SAN MATEO
Revision Date: Aug 19, 2019

SALARY RANGE

$51.14 - $63.93 Hourly
$4,091.20 - $5,114.40 Biweekly
$8,864.27 - $11,081.20 Monthly
$106,371.20 - $132,974.40 Annually

DEFINITION:

Perform construction and capital improvement project management work involving the planning, design, bidding and construction of assigned capital facility construction and major building remodel, renovation, upgrade, and tenant improvement projects; integrate of all phases of work, from the initial planning stages, to the completion of construction and warranty period; manage simultaneous capital improvement and major maintenance projects with varying budgeted costs, completion deadlines and levels of political sensitivity and visibility.

DISTINGUISHING CHARACTERISTICS
Capital Projects Manager I is the first level of the Capital Projects Manager series. This classification is distinguished from Capital Project Manager II in that the latter is assigned to capital projects with a budget of up to $40 million. Incumbents exercise discretion and latitude of judgement within established policies and communicate project information orally and in writing with department heads, Board members, the County Manager, heads of other governmental agencies, with contractors, county staff and the public.

SUPERVISION RECEIVED AND EXERCISED
Depending on assignment, receive general direction from a Supervising Capital Project Manager or a higher-level manager. May also receive project direction from a Senior Capital Projects Manager. Exercise direct and indirect supervision over professional and technical staff, including consultants and contractors.

EXAMPLES OF DUTIES:

Duties may include, but are not limited to, the following:

- Manage major and/or complex capital projects from program planning through final acceptance of construction and warranty period.
- Oversee major maintenance and construction projects, which may include infrastructure, underground, structural, system upgrades, retrofits, replacement of building equipment and components.
- Conduct needs assessments, cost analyses and feasibility studies to determine project requirements, space needs, options and cost estimates.
- Manage the consultant, contractor and vendor selection process, including the solicitation and evaluation of bids, coordinating requests for proposals and obtaining Board of Supervisors approvals.
- Provide guidance and coordination of work to consultants and contractors related to project criteria, regulations, codes, standards and schedules.
- Communicate orally and in writing with county officials, other county departments consultants, contractors, architects, engineers, outside agencies and the public on assigned projects.
- Research and plan the various mechanisms used to finance projects such as state and federal grants, county funding, lease purchase agreements, certificates of participation, and joint powers agreements.
- Keep projects within approved budget, and on their approved schedule; analyze claims, project costs, verify expenses, obtain fiscal approval when required and approve contractor/ consultant payment requests.
- Prepare, review and manage contracts, construction documents and technical reports for the development of new county facilities and the alteration of existing facilities or major maintenance projects; and requests for proposals and selection of various consultants and participate in their selection.
- Assure that the pre-architectural work and conceptual designs meet the County's needs and are compatible with master plans.
- Evaluate existing facilities and conduct on-site visits to identify repair or renovation projects and/or observe and approve work.
- Prepare correspondence, communication and reports for the Board of Supervisors.
- Administer construction contracts, including inspection work, contract revisions, submittals, payments, schedules, budgets and project closeouts.
- Act as coordinating liaison with county officials, consultants, contractors, architects, engineers, outside agencies and the public regarding capital improvement projects.
- Maintain all project documents, recommend acceptance of assigned projects as being complete and perform project closeout.
- Manage permit applications, resolve claims and disputes, and file notices.
- Serve as a point of contact for county departments and act as liaison on projects; provide input and recommendations regarding technical and financial aspects, and coordination of various construction activities.
- Work with consultants, architects, engineers, end users, building inspectors, maintenance and operations staff, contractors and vendors during the course of projects.
- Perform related duties as assigned.

QUALIFICATIONS:

Knowledge of:

- Concepts of cost estimating, budgeting and scheduling techniques.
- Architectural planning, detailing and design practices and standards.
- Modern construction design methods and practices including, building construction materials.
- Principles, practices, theories and techniques of construction management including management of all phases of project delivery from project planning to post-construction.
- Structural, mechanical and electrical engineering principles as related to capital projects.
- Project development, management and finance mechanisms.
- Contract negotiation and management practices.
- Codes, ordinances, laws and environmental standards and requirements, including LEED.
- Construction administration including the roles and responsibilities of the various architectural/engineering disciplines, construction managers, contractors and other professionals in the design/construction process.
- Construction safety standards, procedures, best practices and personal protective equipment.
- Construction project management software and other various computer programs and applications relevant to the position.
- Contract negotiation, building cost estimates and budget preparation and control.
- Computer technology and management information systems.

Skill/Ability to:

- Analyze department and County needs for new or remodeled facilities and make recommendations, prepare project scopes, budgets and schedules to meet those needs.

ATTACHMENT 1

- Adhere to and manage project deadlines and time constraints, both practical and contractual.
- Negotiate and prepare contract agreements for construction and remodeling projects.
- Manage construction projects from inception to completion.
- Communicate effectively orally and in writing.
- Establish and maintain cooperative working relationships with those contacted in the course of the work.
- Anticipate, investigate and research a wide spectrum of technical problems and develop alternative solutions.
- Apply architectural and/or engineering techniques and methods.
- Review and approve designs and contract documents for program compliance.
- Prepare, maintain and monitor accurate project budgets, schedules and records.
- Prepare and present a variety of reports and correspondence.
- Use a personal computer for basic spreadsheet, word processing and project management programs.
- Drive to and from jobsites located throughout the County; walk construction sites and/or natural terrain; climb ladders, scaffolds, lifts and inspect confined spaces to observe and approve work.

Education and Experience:
Any combination of education and experience that would likely provide the required knowledge, skills and abilities is qualifying. A typical way to qualify is:

Education: Graduation from an accredited college or university with a major in Architecture, Engineering, Construction Management or a closely related field.

Experience: Three years of experience as a construction superintendent, project manager or estimator for commercial or industrial construction, or as a superintendent of buildings and grounds for large complexes, or as a construction contract administrator in a public agency.

PREVIOUS CLASSIFICATION:

Building Divisions Project Manager
Construction Projects Manager

DATE ESTABLISHED / REVISED:

Est: 4/9/86
Rev: 01/19/2012

Open Space Planner

Class Code: 0598

Bargaining Unit: COMM TECH

COUNTY OF MARIN
Established Date: Sep 13, 1988

SALARY RANGE

$46.07 - $55.06 Hourly
$3,455.25 - $4,129.50 Biweekly
$7,486.38 - $8,947.25 Monthly
$89,836.50 - $107,367.00 Annually

DEFINITION:

Functional Titles:
- Landscape Architects
- Natural Resource Planners

This series specification describes three professional planning classes in the County of Marin Merit System. Under general supervision or general direction, depending upon the level to which assigned, assist/conduct/manage complex and diverse open space research, planning and acquisition functions; prepare and coordinate plans and make presentations on projects to various groups; may oversee and review the work of staff and volunteers; and do other work as assigned.

CLASS CHARACTERISTICS:

Assistant Open Space Planner: This is the entry and training level of the Open Space Planner series. Incumbents are given direct and detailed supervision in learning the techniques of open space planning, research and analysis. Close supervision and frequent review of work will lessen as the incumbent demonstrates the ability to work with some independence.

Open Space Planner: This is the journey level position within the Open Space Planner series. Under general supervision, incumbents conduct open space research and analysis and implement projects of moderate difficulty; exercise considerable independence and judgment in short-range well defined assignments; make presentations on the more routine projects before committees, the Parks, Open Space, and Cultural Commission and community groups. Senior Open Space Planner This is the advanced journey level position within the Open Space Planner series. This class differs from the Open Space Planner in its exercise of a high degree of independent judgment and contact with other agencies and the public. This position differs from the Planning and Acquisition Manager due to the administrative and management responsibilities of the latter class. Incumbents conduct open

ATTACHMENT 1

space research and analysis and implement projects of considerable complexity and difficulty.

In addition, this classification makes presentations on projects of varying difficulty before committees, the Marin County Parks, Open Space and Cultural Commission, and community groups and is expected to attend evening and weekend meetings. Direction is received from the Planning and Acquisition Manager.

EXAMPLES OF DUTIES (ILLUSTRATIVE ONLY):

Note: The following duties are performed by employees in this classification. However, employees may perform other related duties at an equivalent level. Each individual in the classification does not necessarily perform all duties listed.

Assistant Open Space Planner:

- Prepare maps, sketches, and graphic presentations for open space projects.
- Respond to routine citizen and agency requests for maps and information about the Open Space District and its lands.
- Assist with preparation of plans and construction documents for open space improvements.
- Prepare graphics and text for open space sign system.
- Assist in maintaining open space map files and reproduce maps as necessary.
- Research land ownership, easements, and public access questions.
- Oversee layout and production of signs, brochures and maps by private contractors.
- Prepare informational displays.
- Update brochures and fact sheets.

Open Space Planner (in addition to the above):

- Review and monitor development projects that affect open space and public trail interests.
- Make site inspections of improvements on open space lands or projects affecting such lands and ensure compliance with approved plans.
- Serve as staff to assigned committees.
- Conduct research and prepare graphics as needed for grant proposals and open space and trail acquisitions and improvements.
- Maintain open space and trail data base, map system and photo archives.
- Develop maps, brochures and fact sheets for public distribution.
- Review and recommend revisions to content of Open Space District's web site; oversee revisions.
- Supply consultants and contractors with necessary information to carry out their work in a timely fashion.
- Develop and maintain style and format for open space sign system.
- Assist the public with information requests and routine needs.
- Prepare plans for open space and trail improvement projects of limited complexity.
- Assist with preparation of environmental review documents, bid documents and grant and permit applications for open space projects.
- Make site inspections and conduct research on encroachments, boundary questions, and maintenance needs at boundaries of open space lands.
- Assist in preparation of construction contracts, professional service agreements and other agreements of limited complexity.

Senior Open Space Planner (in addition to the above):

- Review and monitor development projects of considerable complexity that affect open space and public trail interests.
- Assist with boundary adjustments, resolution of encroachments and other real estate activities as necessary.

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- Prepare or oversee preparation of plans for open space and trail projects of varying complexity.
- Review work of staff and volunteers.
- Coordinate and oversee land and trail acquisitions obtained through the development approval process; conduct research for other land and trail acquisition projects and assist with coordination of such projects as assigned.
- Assist with development of open space policies.
- Serve as staff to assigned committees, both regional and local.
- Prepare and assist with preparation of grant proposals.
- Supervise and review the work of consultants and contractors and supply same with information necessary to carry out their work on projects in a timely fashion.
- Prepare or oversee preparation of environmental review documents and permit applications for open space projects.
- Prepare or oversee preparation of bid documents for open space projects.
- Assist with department administrative responsibilities as assigned.
- Represent the Open Space District at public or private meetings as assigned or necessary.
- Prepare and assist in the administration of construction contracts, professional service agreements, and other agreements.

MINIMUM QUALIFICATIONS AND CERTIFICATIONS & LICENSES:

All Levels: A combination of education and experience equivalent to graduation from college with a major in landscape architecture, land use planning, environmental planning, or closely related field that provides the knowledge and abilities below.

Assistant Open Space Planner: No additional experience requirement.

Open Space Planner: One year of professional landscape architecture, land use planning or environmental planning experience.

Senior Open Space Planner Three years of professional landscape architecture, land use planning or environmental planning experience.

NOTE: Additional graduate level courses in landscape architecture, land use planning, environmental planning or closely related fields may substitute for up to one year of the experience requirement at the rate of three semester units for one month of experience.

Special Sub-class Recruitments
Recruitments for positions in this class may be conducted according to the program or department in which a vacancy exists and the special certificates, licenses and/or experience requirements of the position.

Recruitment for these positions may be conducted to include bilingual ability according to the needs of the department.

KNOWLEDGE OF:

All Levels:

- Principles of environmental and/or land use planning.
- Principles of natural resource management.
- Principles of ecology.
- Design and construction of open space landscape improvements.
- Map and plan graphic techniques, reading and reproduction.
- General office practices.

Open Space Planner (in addition to the above):

- Research methods as applied to the collection of environmental and other information essential to open space planning
- Local land use planning and project approval process
- Practices of public land management
- Regulatory agency permit requirements
- California Environmental Quality Act
- Subdivision Map Act
- Land surveying principles

Senior Open Space Planner (in addition to the above):

- Techniques of supervision.
- Methods of land preservation.
- Real estate principles and practices, including land acquisition practices.
- Land management planning.
- Local government organization and procedures.
- Public Resources Code, Section 5500.

ABILITY TO:

All Levels:

- Communicate effectively orally and in writing.
- Assemble and analyze various forms of information
- Organize work, establish priorities and meet deadlines.
- Follow written and oral directions.
- If position requires a license, ability to operate a four-wheel drive vehicle under rugged and sometimes remote conditions.
- Establish and maintain effective working relationships with staff members and other persons contacted in the performance of duties.
- Use a personal computer for word processing and internet research.
- Use a 35 mm and digital camera.

Open Space Planner (in addition to the above):

- Prepare or assist in preparation of planning studies and projects of moderate complexity.
- Prepare or assist in preparation of maps, drawings and other graphic representations.
- Prepare or assist in preparation of written studies and reports.
- Organize and make presentations to private and public groups.
- Deal tactfully and effectively with consultants, contractors, representatives of other departments and agencies, and the general public.
- Conduct site inspections.
- Work independently and with considerable initiative under general supervision.
- Handle a variety of projects at one time.

Senior Open Space Planner (in addition to the above):

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- Perform advanced staff work in evaluating projects, prepare or oversee development of plans, make recommendations and requests.
- Prepare difficult, complex and specialized planning studies and projects.
- Prepare maps, drawings and other graphic representations.
- Prepare written studies and reports.
- Supervise and evaluate subordinate staff.
- Organize and supervise volunteers.
- Deal tactfully and effectively with consultants, contractors, government officials, representatives of other departments and agencies, interest groups and the general public.

Senior Open Space Planner

Class Code: 0599

Bargaining Unit: COMM TECH

COUNTY OF MARIN
Established Date: Mar 31, 1992
Revision Date: Sep 3, 2000

SALARY RANGE

$52.42 - $62.72 Hourly
$3,931.50 - $4,704.00 Biweekly
$8,518.25 - $10,192.00 Monthly
$102,219.00 - $122,304.00 Annually

DEFINITION:

Functional Titles

Natural Resource Planners

This series specification describes three professional planning classes in the County of Marin Merit System. Under general supervision or general direction, depending upon the level to which assigned, assist/conduct/manage complex and diverse open space research, planning and acquisition functions; prepare and coordinate plans and make presentations on projects to various groups; may oversee and review the work of staff and volunteers; and do other work as assigned.

CLASS CHARACTERISTICS:

Assistant Open Space Planner

This is the entry and training level of the Open Space Planner series. Incumbents are given direct and detailed supervision in learning the techniques of open space planning, research and analysis. Close supervision and frequent review of work will lessen as the incumbent demonstrates the ability to work with some independence.

Open Space Planner

This is the journey level position within the Open Space Planner series. Under general supervision, incumbents conduct open space research and analysis and implement projects of moderate difficulty; exercise considerable independence and judgment in short-range well defined assignments; make presentations on the more routine projects before committees, the Parks, Open Space, and Cultural Commission and community groups.

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Senior Open Space Planner

This is the advanced journey level position within the Open Space Planner series. This class differs from the Open Space Planner in its exercise of a high degree of independent judgment and contact with other agencies and the public. This position differs from the Planning and Acquisition Manager due to the administrative and management responsibilities of the latter class. Incumbents conduct open space research and analysis and implement projects of considerable complexity and difficulty. In addition, this classification makes presentations on projects of varying difficulty before committees, the Marin County Parks, Open Space and Cultural Commission, and community groups and is expected to attend evening and weekend meetings. Direction is received from the Planning and Acquisition Manager.

EXAMPLES OF DUTIES (ILLUSTRATIVE ONLY):

Assistant Open Space Planner:

- Prepare maps, sketches, and graphic presentations for open space projects.
- Respond to routine citizen and agency requests for maps and information about the Open Space District and its lands.
- Assist with preparation of plans and construction documents for open space improvements.
- Prepare graphics and text for open space sign system.
- Assist in maintaining open space map files and reproduce maps as necessary.
- Research land ownership, easements, and public access questions.
- Oversee layout and production of signs, brochures and maps by private contractors.
- Prepare informational displays.
- Update brochures and fact sheets.

Open Space Planner (in addition to the above):

- Review and monitor development projects that affect open space and public trail interests.
- Make site inspections of improvements on open space lands or projects affecting such lands and ensure compliance with approved plans.
- Serve as staff to assigned committees.
- Conduct research and prepare graphics as needed for grant proposals and open space and trail acquisitions and improvements.
- Maintain open space and trail data base, map system and photo archives.
- Develop maps, brochures and fact sheets for public distribution.
- Review and recommend revisions to content of Open Space District's web site; oversee revisions.
- Supply consultants and contractors with necessary information to carry out their work in a timely fashion.
- Develop and maintain style and format for open space sign system.
- Assist the public with information requests and routine needs.
- Prepare plans for open space and trail improvement projects of limited complexity.
- Assist with preparation of environmental review documents, bid documents and grant and permit applications for open space projects.
- Make site inspections and conduct research on encroachments, boundary questions, and maintenance needs at boundaries of open space lands.
- Assist in preparation of construction contracts, professional service agreements and other agreements of limited complexity.

Senior Open Space Planner (in addition to the above):

- Review and monitor development projects of considerable complexity that affect open space and public trail interests.

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- Assist with boundary adjustments, resolution of encroachments and other real estate activities as necessary.
- Prepare or oversee preparation of plans for open space and trail projects of varying complexity.
- Review work of staff and volunteers.
- Coordinate and oversee land and trail acquisitions obtained through the development approval process; conduct research for other land and trail acquisition projects and assist with coordination of such projects as assigned.
- Assist with development of open space policies.
- Serve as staff to assigned committees, both regional and local.
- Prepare and assist with preparation of grant proposals.
- Supervise and review the work of consultants and contractors and supply same with information necessary to carry out their work on projects in a timely fashion.
- Prepare or oversee preparation of environmental review documents and permit applications for open space projects.
- Prepare or oversee preparation of bid documents for open space projects.
- Assist with department administrative responsibilities as assigned.
- Represent the Open Space District at public or private meetings as assigned or necessary.
- Prepare and assist in the administration of construction contracts, professional service agreements, and other agreements.

MINIMUM QUALIFICATIONS AND CERTIFICATIONS & LICENSES:

All Levels

A combination of education and experience equivalent to graduation from college with a major in landscape architecture, land use planning, environmental planning, or closely related field that provides the knowledge and abilities below.

Assistant Open Space Planner

No additional experience requirement.

Open Space Planner

One year of professional landscape architecture, land use planning or environmental planning experience.

Senior Open Space Planner

Three years of professional landscape architecture, land use planning or environmental planning experience.

NOTE: Additional graduate level courses in landscape architecture, land use planning, environmental planning or closely related fields may substitute for up to one year of the experience requirement at the rate of three semester units for one month of experience.

KNOWLEDGE OF:

All Levels:

- Principles of environmental and/or land use planning.
- Principles of natural resource management.
- Principles of ecology.
- Design and construction of open space landscape improvements.
- Map and plan graphic techniques, reading and reproduction.
- General office practices.

Open Space Planner (in addition to the above):

- Research methods as applied to the collection of environmental and other information essential to open space planning
- Local land use planning and project approval process
- Practices of public land management
- Regulatory agency permit requirements
- California Environmental Quality Act
- Subdivision Map Act
- Land surveying principles

Senior Open Space Planner (in addition to the above):

- Techniques of supervision.
- Methods of land preservation.
- Real estate principles and practices, including land acquisition practices.
- Land management planning.
- Local government organization and procedures.
- Public Resources Code, Section 5500.

ABILITY TO:

All Levels:

- Communicate effectively orally and in writing.
- Assemble and analyze various forms of information
- Organize work, establish priorities and meet deadlines.
- Follow written and oral directions.
- If position requires a license, ability to operate a four-wheel drive vehicle under rugged and sometimes remote conditions.
- Establish and maintain effective working relationships with staff members and other persons contacted in the performance of duties.
- Use a personal computer for word processing and internet research.
- Use a 35 mm and digital camera.

Open Space Planner(in addition to the above):

- Prepare or assist in preparation of planning studies and projects of moderate complexity.
- Prepare or assist in preparation of maps, drawings and other graphic representations.
- Prepare or assist in preparation of written studies and reports.
- Organize and make presentations to private and public groups.
- Deal tactfully and effectively with consultants, contractors, representatives of other departments and agencies, and the general public.
- Conduct site inspections.
- Work independently and with considerable initiative under general supervision.
- Handle a variety of projects at one time.

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Senior Open Space Planner (in addition to the above):

- Perform advanced staff work in evaluating projects, prepare or oversee development of plans, make recommendations and requests.
- Prepare difficult, complex and specialized planning studies and projects.
- Prepare maps, drawings and other graphic representations.
- Prepare written studies and reports.
- Supervise and evaluate subordinate staff.
- Organize and supervise volunteers.
- Deal tactfully and effectively with consultants, contractors, government officials, representatives of other departments and agencies, interest groups and the general public.

Midpeninsula Regional Open Space District

PLANNER I/II

DEFINITION

Under direct supervision, performs various professional field and office planning work related to open space, natural resource, public access, land acquisition and/or capital improvement planning, including researching and compiling project information, conducting field surveys and observations to assess the status of District open spaces, analyzing land uses, and evaluating natural and cultural resource issues; provides project management and administration on a variety of projects, including land use and management plans, feasibility and planning studies, site plans and environmental reviews; provides professional advice and assistance to other District staff, organizations, governmental and regulatory agencies, and the public on site planning, development, and environmental reviews; presents staff reports; reviews and provides feedback on external agency and development projects and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives direct supervision from assigned Planner III, Senior Planner and/or the Planning Manager. Exercises no direct supervision over staff. May provide technical and functional training to interns and direction to interns and/or consultants.

CLASS CHARACTERISTICS

Planner I: This is the entry-level class in the Planner series. Incumbents at this level are not expected to have directly related work experience, but are expected to have acquired urban, environmental, park or open space planning, ...inistration, and/or related education and ... within procedural frameworks establish... ...ents perform with increasing independe... in that the latter is the first fully experienced classification capable of working independently on individually assigned complex planning projects, whereas the Planner I class is typically assigned to small-scale projects or to support larger scale projects that are managed by more experienced professional planners.

Planner I series not included in comparison to CPM II series

Planner II: This is the first experienced-level class in the Planner series. Incumbents are expected to have basic planning experience and perform professional and technical planning work in an urban or environmental planning, community development, environmental sciences, public administration, open space, and/or related field. As experience is gained, assignments become more varied and complex and are performed with greater independence. Positions at this level usually perform most of the duties required of the positions at the Planner III level but are not expected to function at the same skill level, usually exercise less independent discretion and judgment in matters related to work procedures and methods, and do not have full supervisory responsibility over lower-level staff.

Positions in the Planner class series are flexibly staffed and positions at the II level are normally filled by advancement from the Planner I level requiring two (2) years of experience at the Planner I level and after gaining the knowledge, skills and experience which meet the qualifications for and after demonstrating the ability to perform the work of the higher-level Planner II class.

EXAMPLES OF ESSENTIAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

Facilities = buildings, e.g. South Area Office

- Participates in the scoping, planning, preliminary design and environmental review of capital improvement projects related to new trails, parking lots, or facilities.
- Researches and gathers information regarding historical and cultural resources on District properties to support the Historic Resources Coordination program.
- Conducts and/or assists with the California Environmental Quality Act (CEQA) environmental analysis of capital improvements, facilities, maintenance activities, and proposed new public uses on District lands. Reviews and prepares CEQA documents (e.g., Initial Studies, Categorical Exceptions, Negative Declarations) and sections of CEQA documents (e.g., Mitigated Negative Declarations and Environmental Impacts Reports) as part of the CEQA Coordination program.
- Assists, in consultation with ADA Accessibility Specialists, with the research, analysis and peer review of new facility designs, maintenance and improvements to remove barriers in support of the ADA Program.
- Confers with and advises design and engineering professionals, building and construction professionals, environmental planners and professionals, attorneys, and the general public regarding District development policies and standards; provides and clarifies information relative to land use, environmental compliance, ADA compliance, historic preservation, capital improvement, and other issues.
- Researches, analyzes, and interprets environmental and land use data and trends; prepares written reports on various advance planning matters and elements of other agency general and land use plans.
- Reviews routine to complex planning projects, which may include land use, management, policy, natural resources, regional, site and long range, and capital improvement planning, design and implementation.
- Manages assigned projects and tasks; prepares scopes, schedules and budgets; monitors and approves expenditures; coordinates with participants and stakeholders; recommends adjustments as necessary.
- Reviews and provides interpretations of relevant zoning and other local codes and regulations for project applicability; provides interpretations of environmental and historic preservation regulations, laws, policies, and guidelines.
- Researches and compiles information for the preparation of use and management plans for District preserves and other planning activities; conducts or directs field or background research; meets with District personnel, members of the public, neighbors, and other agency staff to solicit input and identify problems and opportunities; plans and conducts public workshops and resolves issues.
- Develops and solicits consultant requests for proposal for professional services; evaluates proposals and recommends award of contract; administers contracts after award.
- Develops, administers, and monitors planning and engineering consultant contracts; reviews manages consultant work and compares tasks completed against invoice amounts to authorize paym

Incl. contract negotiations

- Participates in the preparation and development of grant applications; assists Grants Program staff with administering grants, monitoring budgets, and submitting reimbursement requests and audit material; addresses project inquiries from granting agencies; prepares necessary grant-supporting reports.
- Prepares staff reports for use and management plan amendments, feasibility and planning studies, contract solicitation and authorization, permit applications, and grant proposals.
- Compiles information for a variety of studies and reports; researches and reviews previous entitlements and records; develops recommendations and prepares written reports on various planning matters.
- Utilizes computer-based or other systems such as GIS or GPS for management and analysis of data regarding District lands, facilities, natural resources and activities.
- Produces maps, graphics, charts, public notices and other supporting information for assigned projects and planning activities, including those for presentations, meetings, reports and studies.

- Prepares staff reports for the General Manager, Board of Directors, and various other committees and advisory boards as directed; conducts briefings and presents materials, project information, and recommendations at public meetings.
- Monitors and conducts external project reviews to identify potential issues or development proposals of private or public lands near or adjacent to open space preserves that may impact District interests and goals; assists in preparing recommendations to permitting agencies or landowners to minimize impacts on District lands or that may affect District interests; prepares comment letters for review by a more senior level planner or the Planning Manager, as appropriate.
- Performs work to support the District's signage program; serves on District sign committee; prepares or modifies new field signs; prepares new signage artwork; conducts field research; improves and maintains District sign manual and sign inventory; researches appropriate sign locations; coordinates with field staff regarding installation; places orders for new signage with vendors.
- Attends meetings, conferences, workshops, and training sessions; attends and participates in professional group meetings; stays abreast of new trends and innovations in the field of planning and other types of public services as they relate to the area of assignment.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Principles and practices of one or more of the following disciplines: urban and regional planning, land use management, cultural resource management, historic preservation, environmental planning and program management, biology, geology, earth sciences, ecology, wildlife and vegetation management.
- Practices of researching planning and land use issues, evaluating alternatives, making sound recommendations, and preparing and presenting effective staff reports.
- Basic concepts of ecology, flora, fauna, geological, aquatic archaeological, and cultural resources of California, specifically those found on District preserves.
- Principles and practices of resource management and site planning.
- Basic concepts of architecture, landscape architecture, and engineering as they relate to assigned projects, including grading, drainage, traffic and transportation studies.
- Project management and contract administration principles and techniques.
- Basic methods and techniques of effective research, analysis, and technical report preparation and presentation.
- Technology including hardware and software and current applications related to geographic information systems (GIS) and global positioning systems (GPS), including database management, graphics, mapping, and desktop publishing systems.
- Basic principles of project budget preparation and management.
- Modern office methods, practices, procedures, and equipment, including hardware and software and current applications, including database management, graphics, mapping and report generation.
- Applicable Federal, State, and local laws, codes, and requirements and related reports.
- Recent developments, current literature, and sources of information related to planning, land use, and environmental review.
- Principles of mathematics, their application to planning work and basic cost estimation for project budgets.
- Project management and contract administration principles and techniques.
- Record keeping principles and procedures.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for effectively representing the District in contacts with governmental agencies, community groups, various business, professional, educational and regulatory organizations, and with property owners, developers, contractors, and the public.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors and District staff.

- Procedures used in conducting and documenting field observations.

Ability to:
- Conduct research projects, evaluate alternatives, and make sound recommendations.
- Interpret planning programs to the general public; identify and respond to issues and concerns of the public, other District staff, and other boards and commissions.
- Read and interpret maps, blueprints, construction plans, documents and specifications, property descriptions and make site visits, confer with field staff on site conditions and plans.
- Modify topographic maps, capital improvement plans, and illustrative graphics using GIS software.
- Assist in the development and implementation of systems and equipment related to the District's Geographic Information System (GIS) program.
- Read plans and specifications and make effective site visits.
- Assess, monitor, and report environmental impact on District lands, resources and facilities and of various District programs and services.
- Analyze site design, terrain constraints, land use compatibility, utilities, and other urban services.
- Read, interpret, apply, and explain technical written material and complex Federal, State, and local policies, procedures, laws, regulations, ordinances, and District planning policies and procedures.
- Read and understand technical drawings and specifications.
- Perform mathematical and planning computations with precision.
- Effectively represent the department and the District in meetings with governmental agencies, community groups, and various business, professional, and regulatory organizations and individuals.
- Coordinate assigned activities with other District departments and agencies as required.
- Direct the work of contract consultants.
- Prepare and present clear, concise, and logical written and oral reports, correspondence, policies, procedures, and other written materials.
- Make sound decisions within established policy and procedural guidelines.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work; set and communicate priorities; and meet critical time deadlines.
- Establish and maintain a variety of filing, record-keeping, and tracking systems.
- Operate present day office equipment including computer equipment and specialized software applications programs (Microsoft Office applications).
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:
Any combination of training and experience that would provide the required knowledge, skills and abilities is qualifying. A typical way to obtain the required qualifications would be:

For Planner I and II: Equivalent to graduation from an accredited four-year college or university with major coursework in urban or environmental planning, community development, environmental sciences, public administration, or a related field.

Planner I: No experience is required. One year of responsible experience and/or internships in urban, environmental, or open space planning desirable, preferably on projects equivalent to those found at the District.

Planner II: Two (2) years of increasingly responsible experience in urban, environmental, or open space planning desirable, preferably on projects equivalent to those found at the District.

Licenses and Certifications:

- Possession of a valid California Driver's License.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer, to inspect District project sites, including traversing uneven and steep terrain and wildland areas, climbing ladders, stairs, and other temporary or construction access points; to operate a motor vehicle including in remote areas on dirt roads, and to visit various District and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups, and over the telephone. This position includes sedentary office work and field work requiring standing in and walking between work areas and project sites. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push and pull materials and objects weighing up to 25 pounds.

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may work in the field and occasionally be exposed to loud noise levels, cold and blustery to hot and dry temperatures, inclement weather conditions, or road hazards. Employees may interact with upset individuals and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

EFFECTIVE: March 2017
REVISED: February 2022
FLSA: Non-Exempt

Midpeninsula Regional Open Space District

CAPITAL PROJECT MANAGER II

DEFINITION

Under general direction, performs complex professional level of engineering and construction project management duties, including designing and implementing capital improvement and natural resource preservation and protection projects; coordinates engineering designs with other District staff, outside consultants, contractors and regulatory agencies; provides professional advice and assistance to other District staff, organizations, governmental and regulatory agencies, and the public; oversees the bidding process and construction efforts; develops a variety of studies; prepares and presents staff reports; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from Engineering and Construction Department Manager, assigned management and/or supervisory staff.

CLASS CHARACTERISTICS

This is the first experienced-level class in the professional Engineering and Construction Department - Capital Project Manager series. Incumbents are expected to perform the basic range of engineering review and construction management duties in all of the following areas: capital improvement, open space, land use, and natural resource protection. Successful performance of work requires significant knowledge of a broad range of building and park infrastructure projects and the ability to adapt to and effectively work in a wide variety of terrain including mountainous rural, open space with varying site and natural resource conditions. Positions at this level usually perform most of the duties required of the positions at the CPM III level but not expected to function at the same skill level. Positions at this level will receive instruction or assistance regularly but are fully aware of the operating procedures and policies of the work unit.

EXAMPLES OF ESSENTIAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

For all assignments:

- Participates in the development, implementation and completion of capital improvement projects related to new trails, parking lots, buildings, facilities, and/or District infrastructure.
- Prepares and implements site improvement and repair plans; prepares studies and designs; evaluates alternatives; obtains necessary permits; prepares project budget estimates and schedules; reviews bids and selects consultants and contractors.
- Makes recommendations on solutions to engineering and construction related issues.
- Develops and standardizes procedures and methods to improve the efficiency and effectiveness of assigned services, projects, and activities; identifies opportunities for improvement and recommends to District management staff.
- Participates in the preparation of project implementation budgets, and monitors project expense budgets and approves/processes project expenditures.

- Serves as source of information for developers, engineers, property owners, and contractors regarding general capital programs, projects, and functions; represents the department and District to outside agencies, public and private groups, and the general public; facilitates community participation through a continual dialogue with residents on major projects.
- Develops consultant requests for proposal, advertising, and bid processes for professional and/or construction services; evaluates proposals and recommends project award; administers contracts after award.
- Negotiates, administers, and manages contracts for services; reviews documents, reports, and other work products prepared by consultants and provides feedback and corrections; reviews and oversees consultant invoices and progress payments.
- Prepares and presents staff reports for capital improvement design and construction projects, contract solicitation and authorization, permits and licenses.

Historic, ADA, CEQA

- Provides highly complex staff assistance to management staff; develops and reviews staff reports related to assigned activities, projects, and services.
- Represents the District to outside agencies, before the City or County Planning Commission, Department of Public Work, and Council or Board; conducts presentations regarding District capital project issues.
- Attends and participates in professional group meetings; stays abreast of new trends and innovations in open space and preserve and related services; researches emerging products and enhancements and their applicability to District needs.
- Monitors changes in regulations and

Historic, ADA, CEQA

ay affect operations; implements policy and procedural changes after approval.
- Receives, investigates, and responds to problems and complaints in a professional manner; identifies and reports findings and takes necessary corrective action.
- Maintains standard construction documents in conformance with changes in legal requirements and practices. Advises consultant and staff in the preparation of technical specifications and construction details as it pertains to codes and constructability.
- Oversees the scheduling of major construction projects to ensure contractual compliance with plans, specifications, materials, schedules, workmanship and safety standards.
- Participates in negotiating claims and proposed change orders and associated costs, resolving field and contractual differences, and processing scheduled progress payments.
- Conducts final inspections to assure the project's completion and that final acceptance includes necessary warranties and resolution of liquidated damages.
- Provides appropriate operational staff with documents, warranties and, as necessary, an orientation of specialized functional components and systems.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Project and program management principles and practices, including goal setting, work plan development, budget tracking, implementation, and evaluation.
- Applicable Federal, State, and local laws, codes, and regulations concerning the operation of the assigned function.
- Principles of construction management methods relating to legal, contractual, inspection, and safety.
- Basic principles and practices of budget development and administration.
- Principles and practices of contract negotiation and administration.
- Practices of researching engineering and construction issues, evaluating alternatives, making sound recommendations, and preparing and presenting effective staff reports.
- Principles of mathematics and geometry and their application to engineering and construction work.
- Methods and techniques of effective technical report preparation and presentation.

- Recent developments, current literature, and sources of information related to engineering and construction review.
- Modern office methods, practices, procedures, and equipment, including computer hardware and software necessary for graphic presentation, mapping, and database management.
- Principles of advanced mathematics and their application to planning work.
- Methods and techniques of effective technical report preparation and presentation.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for effectively representing the District in contacts with governmental agencies, community groups, various business, professional, educational and regulatory organizations, and with property owners, developers, contractors, and the public.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors and District staff.

Ability to:

- Administer complex, technical, and sensitive engineering, construction, and related programs in an independent and cooperative manner.
- Recommend and implement goals, objectives, and practices for providing effective and efficient services.
- Evaluate and develop improvements in operations, procedures, policies, or methods.
- Research, analyze, and evaluate new service delivery methods, procedures, and techniques.
- Interpret and explain engineering and construction projects and programs to the general public; identify and respond to issues and concerns of the public, District staff, Board of Directors, and other boards and commissions.
- Develop, track, and manage project budgets.
- Assess, monitor, and report environmental impact on and of various District programs and services.
- Conduct complex research projects, evaluate alternatives, and make sound recommendations.
- Read, interpret, apply, and explain technical written material and complex Federal, State, and local policies, procedures, laws, regulations, ordinances, and District policies and procedures.
- Effectively represent the department and the District in meetings with governmental agencies, community groups, and various business, professional, and regulatory organizations and individuals.
- Coordinate assigned activities with other District departments and agencies as required.
- Direct the work of contract consultants.
- Prepare and present clear, concise, and logical written and oral reports, correspondence, policies, procedures, and other written materials.
- Read and understand technical drawings and specifications.
- Perform mathematical computations with precision.
- Make sound, independent decisions within established policy and procedural guidelines.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:
Any combination of training and experience that would provide the required knowledge, skills and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to graduation from an accredited four-year college or university with major coursework in landscape architecture, architecture, civil or structural engineering, construction project management, or a related field, and three (3) years of increasingly responsible experience in project management preferably in parks, open space, or related field. A Master's Degree in an Engineering, Architecture, or Geology discipline and/or a professional license (PE, PG, Landscape Architect, Architect) is highly desirable.

Licenses and Certifications:

- Possession of a valid California Driver's License.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer, to inspect District development sites, including traversing uneven terrain, climbing ladders, stairs, and other temporary or construction access points; to operate a motor vehicle, and to visit various District and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups, and over the telephone. This is partially a sedentary office and partially a field classification and standing in and walking between work areas and development sites is required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push and pull materials and objects weighing up to 25 pounds.

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may work in the field and occasionally be exposed to loud noise levels, cold and hot temperatures, inclement weather conditions, or road hazards. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

EFFECTIVE: November 2017
REVISED: N/A
FLSA: Exempt

DRAFT

Midpeninsula Regional Open Space District
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
October 2023

Planner II

Rank	Comparator Agency	Classification Title	Review requested	K&A Response	Unadjusted Top Monthly Salary	Cost of Wages	Adjusted Top Monthly Salary	Adjusted upon Review	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Santa Clara Valley Water District	Assistant Environmental Planner II	Assistant Environmental Planner II /Project Manager	Disagree - maintain match[1]	$ 11,385	100.00%	$ 11,385	$ 11,385	6/26/2023	7/1/2024	3.00%
2	Santa Clara Valley Open Space	Associate Open Space Planner	no review		$ 11,173	100.00%	$ 11,173	$ 11,173	7/1/2023	7/1/2024	unknown
3	County of Riverside	Park Planner	N/C	Disagree - maintain match[2]	$ 8,774	83.20%	$ 10,546	$ 10,546	5/1/2023	unknown	unknown
4	City of Walnut Creek	Associate Planner	Senior Planner /Project Manager	Disagree - maintain match[3]	$ 10,232	100.00%	$ 10,232	$ 10,232	6/25/2023	unknown	unknown
5	**Midpeninsula Regional Open**	**Planner II**			**$ 9,942**	**100.00%**	**$ 9,942**	**$ 9,942**	**7/1/2023**	**unknown**	**unknown**
6	County of Santa Cruz	Park Planner II	Park Planner III	Disagree - maintain match[4]	$ 8,580	86.30%	$ 9,942	$ 9,942	9/2/2023	unknown	unknown
7	City of Palo Alto	Associate Planner	Associate Planner /Senior Planner	Disagree - maintain match[5]	$ 9,878	100.00%	$ 9,878	$ 9,878	1/28/2023	1/13/2024	4.00%
8	County of Sonoma	Park Planner II	Park Planner II /Senior Park Planner	Disagree - maintain match[6]	$ 8,677	88.40%	$ 9,816	$ 9,816	5/16/2023	3/5/2024	4.50%
9	County of Santa Clara	Associate Planner	Associate Planner /Project Manager	Disagree - maintain match[7]	$ 9,671	100.00%	$ 9,671	$ 9,671	9/4/2023	6/24/2024	4.00%
10	East Bay Regional Park District	Planner	Senior Planner	Disagree - maintain match[8]	$ 9,526	100.00%	$ 9,526	$ 9,526	3/25/2023	unknown	unknown
11	County of Sacramento	Assistant Planner	N/C	Disagree - maintain match[9]	$ 7,941	85.20%	$ 9,321	$ 9,321	6/18/2023	6/30/2024	CPI 2.00 - 4.00%
12	County of San Mateo	Planner II	Planner II /Capital Project Manager I	Disagree - maintain match[10]	$ 9,260	100.00%	$ 9,260	$ 9,260	10/1/2023	unknown	unknown
13	County of Marin	Open Space Planner	Senior Open Space Planner	[Open Space Planner /Senior Open Space Planner][11]	$ 8,947	100.00%	$ 8,947	$ 9,570	7/1/2023	7/1/2024	3.00%
14	Livermore Area Recreation and	N/C									
15	Marin Municipal Water District	N/C									

Summary Results	Unadjusted Top Monthly	Adjusted Top Monthly	Updated Top Monthly
Average of Comparators	$ 9,504	$ 9,975	$ 10,026
% Midpeninsula Regional Open Space District Above/Below	4.4%	-0.3%	-0.8%
Median of Comparators	$ 9,393	$ 9,847	$ 9,847
% Midpeninsula Regional Open Space District Above/Below	5.5%	1.0%	1.0%
Number of Matches	12	12	12

N/C - Non Comparator

1 - Project manager classification is a supervisory position responsible for legislative analysis and annual work plans - not comparable.
2 - Park Planner is the journey level planner for park projects, including providing construction supervision and coordinating permits for construction. This makes the 70% threshold for a comparable match.
3 - The Senior Planner is both the supervisory level and zoning administrator - not comparable. The Project Manager is a management level classification with authority to choose vendors/contractors, develops and determines project goals and schedules, and supervises staff - not comparable.
4 - Park Planner II is the journey level responsible for design and management of assigned projects, makes presentations to internal and community groups as well as decision-making authorities, and oversees and inspects park construction projects. This is the appropriate level match.
5 - Senior Planner is the lead level classification who supervises the environmental impact report process, leading and coordinating the work of other staff members for planning projects - not comparable.
6 - The Senior Park Planner is a licensed landscape architect level serving as the subject matter expert in park planning - not comparable.
7 - Project Manager is a manager classification with responsibility for program development, definition of project guidelines, evaluation of regulatory information, legislative review, management of contracts, and quality assurance auditing - not comparable.
8 - Senior planner is the lead level classification with authority to select contractors, negotiate terms, easements, and environmental mitigations - not comparable.
9 - Assistant Planner is the journey level planner classification with responsibility for environmental impact studies, project planning, coordination with outside agencies, and project compliance. This job description is lacking, but does meet the threshold for 70% comparability.
10 - Capital Project Manager I is a supervisory position with a focus on construction management including cost estimating, budgeting, scheduling, and financing, knowledge of structural and mechanical engineering principles, and experience required as a construction superintendent, or project manager for commercial or industrial construction make this not comparable.
11 - County of Marin: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.

ATTACHMENT 1

Midpeninsula Regional Open Space District - CLASSIFICATION & COMPENSATION PLAN

Fiscal Year 2023/2024 - Effective July 1, 2023 (Pay Period 23-14)

Last revised: 06/28/2023, 06/14/2023, 04/26/2023, 01/25/2023, 11/09/2022, 08/10/2022, 06/08/2022, 10/13/2021, 8/25/2021, 8/11/2021

Classification Title	Step Range #	Hourly Range $		Monthly Range $		Annual Range $		Full/Part Time
		Minimum	Maximum	Minimum	Maximum	Minimum	Maximum	
Intern	6	24.9605	31.1647	4,326	5,402	51,918	64,823	PT
Seasonal Open Space Technician	10	27.5110	34.3673	4,769	5,957	57,223	71,484	PT
Seasonal Ranger Aide	10	27.5110	34.3673	4,769	5,957	57,223	71,484	PT
Seasonal Ranger	16	31.8597	39.7762	5,522	6,895	66,268	82,734	PT
Administrative Assistant	20	35.1267	43.8455	6,089	7,600	73,064	91,199	FT
Farm Maintenance Worker	20	35.1267	43.8455	6,089	7,600	73,064	91,199	FT
Open Space Technician*	20	35.1267	43.8455	6,089	7,600	73,064	91,199	FT
Accounting Technician	22	36.8675	46.0379	6,390	7,980	76,684	95,759	FT
Human Resources Technician	22	36.8675	46.0379	6,390	7,980	76,684	95,759	FT
GIS Technician	23	37.7989	47.1985	6,552	8,181	78,622	98,173	FT
Information Technology Technician I	24	38.7087	48.3518	6,710	8,381	80,514	100,572	FT
Senior Administrative Assistant	24	38.7087	48.3518	6,710	8,381	80,514	100,572	FT
Visitor Services Program Coordinator	25	39.6832	49.5556	6,878	8,590	82,541	103,076	FT
Volunteer Program Lead	25	39.6832	49.5556	6,878	8,590	82,541	103,076	FT
Facilities Maintenance Specialist	26	40.6432	50.7592	7,045	8,798	84,538	105,579	FT
Lead Open Space Technician*	26	40.6432	50.7592	7,045	8,798	84,538	105,579	FT
Senior Finance & Accounting Technician	26	40.6432	50.7592	7,045	8,798	84,538	105,579	FT
Executive Assistant	27	41.6605	52.0344	7,221	9,019	86,654	108,232	FT
Public Affairs Specialist I	27	41.6605	52.0344	7,221	9,019	86,654	108,232	FT
Ranger	27	39.2689	49.0474	6,807	8,502	81,679	102,019	FT
Equipment Mechanic/Operator	28	42.6850	53.2952	7,399	9,238	88,785	110,854	FT
Property Management Specialist I	28	42.6850	53.2952	7,399	9,238	88,785	110,854	FT
Real Property Specialist I	28	42.6850	53.2952	7,399	9,238	88,785	110,854	FT
Executive Assistant/Deputy District Clerk	29	43.7525	54.6279	7,584	9,469	91,005	113,626	FT
Executive Assistant/Legal Secretary	29	43.7525	54.6279	7,584	9,469	91,005	113,626	FT
Information Technology Technician II	29	43.7525	54.6279	7,584	9,469	91,005	113,626	FT
Planner I	29	43.7525	54.6279	7,584	9,469	91,005	113,626	FT
Data Analyst I	30	44.8200	55.9675	7,769	9,701	93,226	116,412	FT
Lead Ranger	30	42.2472	52.7547	7,323	9,144	87,874	109,730	FT
Resource Management Specialist I	30	44.8200	55.9675	7,769	9,701	93,226	116,412	FT
Accountant I	31	45.9378	57.3574	7,963	9,942	95,551	119,303	FT
Capital Project Manager II	31	45.9378	57.3574	7,963	9,942	95,551	119,303	FT
Environmental Education Specialist	31	45.9378	57.3574	7,963	9,942	95,551	119,303	FT
Interpretive Specialist	31	45.9378	57.3574	7,963	9,942	95,551	119,303	FT
Management Analyst I	31	45.9378	57.3574	7,963	9,942	95,551	119,303	FT
Planner II	31	45.9378	57.3574	7,963	9,942	95,551	119,303	FT
Data Analyst II	34	49.4050	61.7062	8,564	10,696	102,762	128,349	FT
Resource Management Specialist II	34	49.4050	61.7062	8,564	10,696	102,762	128,349	FT
Accountant II	35	50.6373	63.2394	8,777	10,961	105,326	131,538	FT
Interpretation & Education Program Manager	35	50.6373	63.2394	8,777	10,961	105,326	131,538	FT
Maintenance, Construction & Resource Supv.	35	50.6373	63.2394	8,777	10,961	105,326	131,538	FT
Management Analyst II	35	50.6373	63.2394	8,777	10,961	105,326	131,538	FT
Property Management Specialist II	35	50.6373	63.2394	8,777	10,961	105,326	131,538	FT
Real Property Specialist II	35	50.6373	63.2394	8,777	10,961	105,326	131,538	FT
Supervising Ranger	35	47.7305	59.6093	8,273	10,332	99,279	123,987	FT
Volunteer Program Manager	35	50.6373	63.2394	8,777	10,961	105,326	131,538	FT
Applications Engineer	36	51.8840	64.7870	8,993	11,230	107,919	134,757	FT
Procurement Specialist	36	51.8840	64.7870	8,993	11,230	107,919	134,757	FT
Public Affairs Specialist II	36	51.8840	64.7870	8,993	11,230	107,919	134,757	FT
Training & Safety Specialist	36	51.8840	64.7870	8,993	11,230	107,919	134,757	FT

Classification Title	Step Range #	Hourly Range $		Monthly Range $		Annual Range $		Full/Part Time
		Minimum	Maximum	Minimum	Maximum	Minimum	Maximum	
Data Administrator	38	54.4703	68.0394	9,442	11,793	113,298	141,522	FT
Field Resource Specialist	38	54.4703	68.0394	9,442	11,793	113,298	141,522	FT
Governmental Affairs Specialist	38	54.4703	68.0394	9,442	11,793	113,298	141,522	FT
Grants Program Manager	38	54.4703	68.0394	9,442	11,793	113,298	141,522	FT
Senior Technologist	38	54.4703	68.0394	9,442	11,793	113,298	141,522	FT
Capital Project Manager III	39	55.8316	69.7160	9,677	12,084	116,130	145,009	FT
Facilities Maintenance Supervisor	39	55.8316	69.7160	9,677	12,084	116,130	145,009	FT
Planner III	39	55.8316	69.7160	9,677	12,084	116,130	145,009	FT
Public Affairs Specialist III	39	55.8316	69.7160	9,677	12,084	116,130	145,009	FT
Resource Management Specialist III	39	55.8316	69.7160	9,677	12,084	116,130	145,009	FT
Senior Accountant	41	58.6185	73.2194	10,161	12,691	121,926	152,296	FT
Senior Management Analyst	41	58.6185	73.2194	10,161	12,691	121,926	152,296	FT
Capital Projects Field Manager	42	60.0514	74.9962	10,409	12,999	124,907	155,992	FT
District Clerk/Assistant to General Manager	43	61.5558	76.8802	10,670	13,326	128,036	159,911	FT
Finance Supervisor	43	61.5558	76.8802	10,670	13,326	128,036	159,911	FT
GIS Program Administrator	43	61.5558	76.8802	10,670	13,326	128,036	159,911	FT
Human Resources Supervisor	43	61.5558	76.8802	10,670	13,326	128,036	159,911	FT
Information Technology Program Administrator	43	61.5558	76.8802	10,670	13,326	128,036	159,911	FT
Senior Capital Project Manager	43	61.5558	76.8802	10,670	13,326	128,036	159,911	FT
Senior Planner	43	61.5558	76.8802	10,670	13,326	128,036	159,911	FT
Senior Property Management Specialist	43	61.5558	76.8802	10,670	13,326	128,036	159,911	FT
Senior Real Property Specialist	43	61.5558	76.8802	10,670	13,326	128,036	159,911	FT
Senior Resource Management Specialist	43	61.5558	76.8802	10,670	13,326	128,036	159,911	FT
Area Superintendent	44	63.0603	78.7500	10,930	13,650	131,165	163,800	FT
Area Manager	45	64.6364	80.7131	11,204	13,990	134,444	167,883	FT
Budget & Finance Manager	51	74.8169	93.4442	12,968	16,197	155,619	194,364	FT
Engineering & Construction Manager	51	74.8169	93.4442	12,968	16,197	155,619	194,364	FT
Human Resources Manager	51	74.8169	93.4442	12,968	16,197	155,619	194,364	FT
Information Systems & Technology Manager	51	74.8169	93.4442	12,968	16,197	155,619	194,364	FT
Land & Facilities Services Manager	51	74.8169	93.4442	12,968	16,197	155,619	194,364	FT
Natural Resources Manager	51	74.8169	93.4442	12,968	16,197	155,619	194,364	FT
Planning Manager	51	74.8169	93.4442	12,968	16,197	155,619	194,364	FT
Public Affairs Manager	51	74.8169	93.4442	12,968	16,197	155,619	194,364	FT
Real Property Manager	51	74.8169	93.4442	12,968	16,197	155,619	194,364	FT
Visitor Services Manager	51	74.8169	93.4442	12,968	16,197	155,619	194,364	FT
Assistant General Counsel I	53	78.5568	98.1153	13,617	17,007	163,398	204,080	FT
Assistant General Counsel II	55	82.4899	103.0228	14,298	17,857	171,579	214,287	FT
Assistant General Manager	59	90.9510	113.5830	15,765	19,688	189,178	236,253	FT
Chief Financial Officer/Director Administrative Services	59	90.9510	113.5830	15,765	19,688	189,178	236,253	FT

** OST will receive an additional 1% stipend for Class A or B license; Lead OST 1% for Class A.*

Midpeninsula Regional Open Space District Field Employees Association

Midpeninsula Rangers Peace Officers Association

Board Appointee Group Compensation	Hourly	Monthly	Annual	Effective	Last Revised
General Manager	$135.1231	$23,421	$281,056	7/1/2022	11/9/2022
Controller - *Part-time position*	$98.5058	$4,269	$51,223	7/1/2022	11/9/2022
General Counsel	$126.6966	$21,961	$263,529	7/1/2022	11/9/2022
Elected Officials Compensation	**Per Meeting**		**Monthly Maximum**		**Effective Date**
Board Director	$115.50		$693.00		4/10/2023

RESOLUTION NO. 25-XX

RESOLUTION OF THE BOARD OF DIRECTORS OF THE MIDPENINSULA REGIONAL OPEN SPACE DISTRICT APPROVING AMENDMENTS TO THE DISTRICT CLASSIFICATION AND COMPENSATION PLAN FOR COMPENSATION STUDY ADJUSTMENTS BASED ON THE UPDATED COMPENSATION PHILOSOPHY

WHEREAS, the Board of Directors adopted the amendments to Board Policy 2.03, *Employee Compensation Guiding Principles* on January 22, 2025, to "maintain competitive compensation within the District's labor market" and attract and retain a qualified workforce to accomplish the work of the District; and

WHEREAS, thorough compensation studies were conducted to review comparator agencies' compensation for the same or similar classifications (positions) to ensure that District compensation systems are updated consistent with best practices, and more specifically determine if District compensation is externally competitive and internally equitable pursuant to Board Policy 2.03, *Employee Compensation Guiding Principles*; and

WHEREAS, the Board of Directors has considered certain amendments to the Midpeninsula Regional Open Space District Classification and Compensation Plan based on results from compensation studies conducted on 60 of the District's 95 classifications, including classifications represented by the Field Employees Association and classifications represented by the Midpeninsula Rangers Peace Officers Association, and non-represented Office, Supervisory, and Management classifications (excluding Board Appointees); and

WHEREAS, the Board of Directors desires to adjust wages of certain classifications in keeping to Board Policy 2.03, *Employee Compensation Guiding Principles*.

NOW, THEREFORE, BE IT RESOLVED, that the Board of Directors of the Midpeninsula Regional Open Space District approves the amended Classification and Compensation Plan for Compensation Study Adjustments Based on the Updated Compensation Philosophy as fully set forth in Exhibit A, attached hereto and incorporated herein by this reference, and shall be effective September 1, 2025. The attached Classification and Compensation Plan for Fiscal Year 2025-26 shall supersede the Classification and Compensation Plans for Fiscal Year 2025-26 attached to Resolutions 25-12 and 25-13.

* *

PASSED AND ADOPTED by the Board of Directors of the Midpeninsula Regional Open Space District on August 27, 2025, at a regular meeting thereof, by the following vote:

AYES:
NOES:
ABSTAIN:
ABSENT:

ATTEST:

Zoe Kersteen-Tucker, Secretary
Board of Directors

APPROVED:

Jed Cyr, President
Board of Directors

APPROVED AS TO FORM:

Hilary Stevenson, General Counsel

I, the District Clerk of the Midpeninsula Regional Open Space District, hereby certify that the above is a true and correct copy of a resolution duly adopted by the Board of Directors of the Midpeninsula Regional Open Space District by the above vote at a meeting thereof duly held and called on the above day.

Maria Soria, District Clerk

Midpeninsula Regional Open Space District - CLASSIFICATION & COMPENSATION PLAN

Fiscal Year 2025/2026 - Effective September 1, 2025 (Pay Period 25-19)

Last revised: 08/27/2025, 06/11/2025, 04/09/2025, 10/23/2024, 07/10/2024, 06/26/2024, 04/10/2024, 11/08/2023, 10/11/2023, 06/28/2023

Classification Title	Step Range #	Hourly Range $		Monthly Range $		Annual Range $		Full/Part Time
		Minimum	Maximum	Minimum	Maximum	Minimum	Maximum	
Intern	7	27.1341	33.8835	4,703	5,873	56,439	70,478	PT
Seasonal Ranger Aide	11	29.9160	37.3647	5,185	6,477	62,225	77,719	PT
Seasonal Open Space Technician	15	32.9867	41.1877	5,718	7,139	68,612	85,670	PT
Seasonal Ranger	17	34.6285	43.2552	6,002	7,498	72,027	89,971	PT
Administrative Assistant	22	39.1127	48.8416	6,780	8,466	81,354	101,591	FT
Accounting Technician	26	43.1184	53.8505	7,474	9,334	89,686	112,009	FT
Senior Administrative Assistant	26	43.1184	53.8505	7,474	9,334	89,686	112,009	FT
Farm Maintenance Worker	27	44.1976	55.2033	7,661	9,569	91,931	114,823	FT
Human Resources Technician	27	44.1976	55.2033	7,661	9,569	91,931	114,823	FT
Open Space Technician*	27	44.1976	55.2033	7,661	9,569	91,931	114,823	FT
Ranger Recruit	28	45.2846	56.5409	7,849	9,800	94,192	117,605	FT
Visitor Services Program Coordinator	28	45.2846	56.5409	7,849	9,800	94,192	117,605	FT
Ranger	29	46.4171	57.9547	8,046	10,045	96,548	120,546	FT
Executive Assistant	30	47.5495	59.3759	8,242	10,292	98,903	123,502	FT
Information Technology Technician I	30	47.5495	59.3759	8,242	10,292	98,903	123,502	FT
Senior Finance & Accounting Technician	30	47.5495	59.3759	8,242	10,292	98,903	123,502	FT
Volunteer Program Lead	30	47.5495	59.3759	8,242	10,292	98,903	123,502	FT
Environmental Education Specialist	31	48.7354	60.8504	8,447	10,547	101,370	126,569	FT
Interpretive Specialist	31	48.7354	60.8504	8,447	10,547	101,370	126,569	FT
Property Management Specialist I	31	48.7354	60.8504	8,447	10,547	101,370	126,569	FT
Lead Ranger	32	49.9209	62.3479	8,653	10,807	103,835	129,684	FT
Facilities Maintenance Specialist	33	51.1598	63.9061	8,868	11,077	106,412	132,925	FT
Lead Open Space Technician*	33	51.1598	63.9061	8,868	11,077	106,412	132,925	FT
Planner I	33	51.1598	63.9061	8,868	11,077	106,412	132,925	FT
Public Affairs Specialist I	33	51.1598	63.9061	8,868	11,077	106,412	132,925	FT
Resource Management Specialist I	33	51.1598	63.9061	8,868	11,077	106,412	132,925	FT
Accountant I	34	52.4138	65.4641	9,085	11,347	109,021	136,165	FT
Executive Assistant/Deputy District Clerk	34	52.4138	65.4641	9,085	11,347	109,021	136,165	FT
Executive Assistant/Legal Secretary	34	52.4138	65.4641	9,085	11,347	109,021	136,165	FT
GIS Technician	34	52.4138	65.4641	9,085	11,347	109,021	136,165	FT
Information Technology Technician II	34	52.4138	65.4641	9,085	11,347	109,021	136,165	FT
Real Property Specialist I	34	52.4138	65.4641	9,085	11,347	109,021	136,165	FT
Capital Project Manager I	35	53.7211	67.0907	9,312	11,629	111,740	139,549	FT
Equipment Mechanic/Operator*	35	53.7211	67.0907	9,312	11,629	111,740	139,549	FT
Fleet Services Specialist	35	53.7211	67.0907	9,312	11,629	111,740	139,549	FT
Property Management Specialist II	35	53.7211	67.0907	9,312	11,629	111,740	139,549	FT
Interpretation & Education Program Manager	37	56.4195	70.4504	9,779	12,211	117,353	146,537	FT
Management Analyst I	37	56.4195	70.4504	9,779	12,211	117,353	146,537	FT
Planner II	37	56.4195	70.4504	9,779	12,211	117,353	146,537	FT
Public Affairs Specialist II	37	56.4195	70.4504	9,779	12,211	117,353	146,537	FT
Resource Management Specialist II	37	56.4195	70.4504	9,779	12,211	117,353	146,537	FT
Volunteer Program Manager	37	56.4195	70.4504	9,779	12,211	117,353	146,537	FT
Accountant II	38	57.7875	72.1830	10,017	12,512	120,198	150,141	FT
Data Administrator	38	57.7875	72.1830	10,017	12,512	120,198	150,141	FT
Data Analyst I	38	57.7875	72.1830	10,017	12,512	120,198	150,141	FT
Real Property Specialist II	38	57.7875	72.1830	10,017	12,512	120,198	150,141	FT
Capital Project Manager II	39	59.2317	73.9617	10,267	12,820	123,202	153,840	FT
Supervising Ranger	39	59.2317	73.9617	10,267	12,820	123,202	153,840	FT
Management Analyst II	41	62.1884	77.6785	10,779	13,464	129,352	161,571	FT
Planner III	41	62.1884	77.6785	10,779	13,464	129,352	161,571	FT
Resource Management Specialist III	41	62.1884	77.6785	10,779	13,464	129,352	161,571	FT

Classification Title	Step Range #	Hourly Range $		Monthly Range $		Annual Range $		Full/Part Time
		Minimum	Maximum	Minimum	Maximum	Minimum	Maximum	
Data Analyst II	42	63.7085	79.5635	11,043	13,791	132,514	165,492	FT
Facilities Maintenance Supervisor	42	63.7085	79.5635	11,043	13,791	132,514	165,492	FT
Field Resource Specialist	42	63.7085	79.5635	11,043	13,791	132,514	165,492	FT
Maintenance, Construction & Resource Supv.	42	63.7085	79.5635	11,043	13,791	132,514	165,492	FT
Senior Accountant	42	63.7085	79.5635	11,043	13,791	132,514	165,492	FT
Training & Safety Specialist	42	63.7085	79.5635	11,043	13,791	132,514	165,492	FT
Capital Project Manager III	43	65.3046	81.5622	11,319	14,137	135,834	169,649	FT
Governmental Affairs Specialist	43	65.3046	81.5622	11,319	14,137	135,834	169,649	FT
Procurement Specialist	43	65.3046	81.5622	11,319	14,137	135,834	169,649	FT
Public Affairs Specialist III	43	65.3046	81.5622	11,319	14,137	135,834	169,649	FT
Senior Property Management Specialist	43	65.3046	81.5622	11,319	14,137	135,834	169,649	FT
Applications Engineer	44	66.9007	83.5459	11,596	14,481	139,153	173,775	FT
Senior Real Property Specialist	44	66.9007	83.5459	11,596	14,481	139,153	173,775	FT
Senior Technologist	46	70.2373	87.7264	12,174	15,206	146,094	182,471	FT
Area Superintendent	47	71.9930	89.9229	12,479	15,587	149,745	187,040	FT
Budget & Analysis Supervisor	47	71.9930	89.9229	12,479	15,587	149,745	187,040	FT
Finance Supervisor	47	71.9930	89.9229	12,479	15,587	149,745	187,040	FT
Grants Program Manager	47	71.9930	89.9229	12,479	15,587	149,745	187,040	FT
Human Resources Supervisor	47	71.9930	89.9229	12,479	15,587	149,745	187,040	FT
Senior Management Analyst	47	71.9930	89.9229	12,479	15,587	149,745	187,040	FT
Senior Planner	47	71.9930	89.9229	12,479	15,587	149,745	187,040	FT
Senior Resource Management Specialist	47	71.9930	89.9229	12,479	15,587	149,745	187,040	FT
Area Manager	48	73.7564	92.1119	12,784	15,966	153,413	191,593	FT
Capital Projects Field Manager	48	73.7564	92.1119	12,784	15,966	153,413	191,593	FT
District Clerk/Assistant to General Manager	48	73.7564	92.1119	12,784	15,966	153,413	191,593	FT
Senior Capital Project Manager	49	75.5958	94.4150	13,103	16,365	157,239	196,383	FT
GIS Program Administrator	52	81.3192	101.5519	14,095	17,602	169,144	211,228	FT
Information Technology Program Administrator	52	81.3192	101.5519	14,095	17,602	169,144	211,228	FT
IST Application Program Manager	52	81.3192	101.5519	14,095	17,602	169,144	211,228	FT
Budget & Finance Manager	55	87.5135	109.2969	15,169	18,945	182,028	227,338	FT
Facilities and Fleet Manager	55	87.5135	109.2969	15,169	18,945	182,028	227,338	FT
Human Resources Manager	55	87.5135	109.2969	15,169	18,945	182,028	227,338	FT
Natural Resources Manager	55	87.5135	109.2969	15,169	18,945	182,028	227,338	FT
Public Affairs Manager	55	87.5135	109.2969	15,169	18,945	182,028	227,338	FT
Real Property Manager	55	87.5135	109.2969	15,169	18,945	182,028	227,338	FT
Visitor Services Manager	55	87.5135	109.2969	15,169	18,945	182,028	227,338	FT
Assistant General Counsel I	56	89.6571	111.9647	15,541	19,407	186,487	232,887	FT
Information Systems & Technology Manager	56	89.6571	111.9647	15,541	19,407	186,487	232,887	FT
Engineering & Construction Manager	57	91.8915	114.7618	15,928	19,892	191,134	238,705	FT
Land Stewardship and Trails Manager	57	91.8915	114.7618	15,928	19,892	191,134	238,705	FT
Planning Manager	57	91.8915	114.7618	15,928	19,892	191,134	238,705	FT
Assistant General Counsel II	60	98.8461	123.4341	17,133	21,395	205,600	256,743	FT
Assistant General Manager	65	111.6987	139.4942	19,361	24,179	232,333	290,148	FT
Chief Financial Officer/Director Administrative Services	67	113.6987	141.4942	19,708	24,526	236,493	294,308	FT

** OST, LOST, EMO will receive an additional 2% stipend for Class A license*

Midpeninsula Regional Open Space District Field Employees Association

Midpeninsula Rangers Peace Officers Association

Board Appointee Group Compensation	Hourly	Monthly	Annual	Effective	Last Revised
General Manager	$153.1740	$26,550	$318,602	7/1/2024	10/23/2024
Controller - *Part-time position*	$108.5638	$6,280	$75,365	7/1/2024	4/9/2025
General Counsel	$140.3279	$24,324	$291,882	7/1/2024	10/23/2024
Elected Officials Compensation	**Per Meeting**		**Monthly Maximum**		**Effective Date**
Board Director	$121.28		$727.68		6/9/2024

Midpeninsula Regional
Open Space District

MIDPENINSULA REGIONAL OPEN SPACE DISTRICT

ACTION PLAN AND BUDGET COMMITTEE

Administrative Office
5050 El Camino Real
Los Altos, CA 94022

Tuesday, July 8, 2025

DRAFT MINUTES

CALL TO ORDER

Chair Kersteen-Tucker called the meeting of the Action Plan and Budget Committee to order at 9:00 a.m.

ROLL CALL

Members present: Zoe Kersteen-Tucker, Margaret MacNiven, Curt Riffle

Members absent: None

Staff present: General Counsel Hilary Stevenson, Assistant General Manager Susanna Chan, Assistant General Manager Brian Malone, Chief Financial Officer/Director of Administrative Services Stefan Jaskulak, District Clerk/Assistant to the General Manager Maria Soria, Executive Assistant/Deputy District Clerk Shaylynn Nelson, Human Resources Manager Candice Basnight, and Human Resources Supervisor Rebecca Wolfe

ADOPTION OF AGENDA

Motion: Director MacNiven moved, and Director Riffle seconded the motion to adopt the agenda.

ROLL CALL VOTE: 3-0-0

ORAL COMMUNICATIONS

Public comment opened at 9:02 a.m.

Deputy District Clerk Shaylynn Nelson reported there were no public speakers for this item.

DRAFT

Public comment closed at 9:02 a.m.

COMMITTEE BUSINESS

1. Approve the May 13, 2025 Action Plan and Budget Committee Meeting Minutes

Public comment opened at 9:02 a.m.

Ms. Nelson reported there were no public speakers for this item.

Public comment closed at 9:02 a.m.

Motion: Director MacNiven moved, and Director Riffle seconded the motion to approve the May 13, 2025 Action Plan and Budget Committee meeting minutes.

ROLL CALL VOTE: 3-0-0

2. Amendments to the Midpeninsula Regional Open Space District's Classification and Compensation Plan Reflecting Compensation Study Adjustments Based on the Updated Compensation Philosophy and Comparator Agencies List (R-25-87)

Chief Financial Officer/Director of Administrative Services Stefan Jaskulak presented. Human Resources Manager Candice Basnight and Human Resources Supervisor Rebecca Wolfe assisted in answering questions.

Public comment opened at 9:35 a.m.

Staff members Tina Hugg, Tyler Smith, and Mattea Ottoboni from the Planning Department expressed concern that the Planner positions identified by the District's consultant, Gallagher, are not comparable positions and do not sufficiently account for the hybrid nature of the District's Planners, which share the job functions and qualifications of both Planner and Capital Project Manager positions.

Ryan McCauley expressed concern regarding the implementation of the proposed salary schedule, with employees being assigned to the nearest step in the salary range that is closest to, but not less than, their current hourly rate. He advocated for staff to stay at the same step when moving to the new salary range.

Public comment closed at 9:48 a.m.

Mr. Jaskulak clarified that the District undertook two separate efforts with one being the compensation study and the other a limited classification study for two departments. For the compensation study, the Board approved the new list of comparator agencies and the compensation philosophy, which defines a competitive salary as median plus ten percent. He further explained to encourage staff retention it is proposed to allocate staff to the step nearest, but not less than, their current hourly rate, and staff will still have the potential to grow up to 5% per year until they reach top step. Increasing the salary ranges will also assist in recruitment and hiring new hires at the lower end of a salary range. He recommended forwarding the proposed salary schedule to the Board of Directors (Board). Planning staff can meet with Human

DRAFT

Resources to identify concerns with their comparable positions, which will be reviewed to determine if an adjustment is needed. Any subsequent recommended adjustments to a classification would be forwarded to the Board for approval.

Human Resources Manager Candice Basnight expressed appreciation to the Planners for their collaboration throughout the process. Meetings have been held with the Planners and staff have reviewed their responses except for the last comment letter submitted to the committee. Lastly, she recommended the salary schedule be forwarded to the Board, noting that future adjustments can still be made if deemed appropriate.

Director Riffle expressed agreement with advancing the proposed salary schedule but noted some concern with pieces of the classification study. He suggested further review of the Planners' request to review the comparable positions and a more in-depth review of Capital Project Manager versus Planner positions. He further expressed a preference for placing staff at the salary step nearest their current rate to allow room for growth.

Director MacNiven expressed agreement with forwarding the proposed salary schedule to the Board. She suggested that the entire Planning Department should be reevaluated not just for salary, but perhaps for a new department name due to the variety of work that they conduct.

Chair Kersteen-Tucker expressed a preference to forward the salary schedule to the Board now to enable the District to be competitive in the market. She also recommended further discussion with the Planners regarding their responsibilities, which may influence the job responsibilities of Planners in comparator agencies.

Motion: Director Riffle moved, and Director MacNiven seconded the motion to forward the proposed amendments to the Classification and Compensation Plan reflecting Compensation Study Adjustments based on the updated and Board-approved Compensation Philosophy and Comparator Agencies List to the full Board of Directors for their consideration and approval.

Director Riffle recommended that staff address in their presentation to the Board the likelihood of other agencies adjusting their own compensation philosophies resulting in the District becoming less competitive in the employer market. He further advised that staff emphasize the classification study aspect and provide an explanation of how the District plans to proceed with the classification study, particularly as it relates to the Planners latest comments. He also requested that the comments that were submitted to the Committee from the Planning and Natural Resources staff be provided to the full Board.

ROLL CALL VOTE: 3-0-0

ADJOURNMENT

Chair Kersteen-Tucker adjourned the meeting of the Action Plan and Budget Committee of the Midpeninsula Regional Open Space District at 10:21 a.m.

Shaylynn Nelson, Deputy District Clerk

DRAFT



Documents in this packet include:

- Informational Document Provided by Staff
- Written Comments from Members of the Public to the Board of Directors

Exhibit 1 - Locations of Applicant Headquarters by County Each Cycle

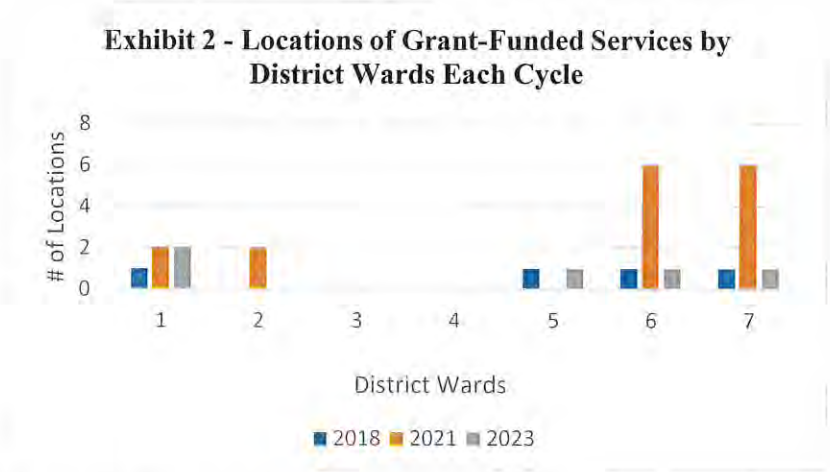


- Across 89 Applications: Locations of Headquarter by City.
  - Applicant headquarters were located in 13 cities:

Berkeley	Palo Alto
Campbell	Pescadero
Davenport	Redwood City
Half Moon Bay	San Gregorio
Los Gatos	San Jose
Milpitas	San Rafel
	Santa Cruz

- Across 22 Grants: Location by Service Delivery.
  - The locations of services delivered varied significantly. A given grantee may have multiple delivery sites.
  - On the Coast: Seven grant-funded projects conducted services at specific locations on the San Mateo coast: Half Moon Bay, Pescadero, San Gregorio, and Tunitas Creek Beach County Park. Other locations included Los Gatos, East Palo Alto, and San Mateo County, and more generally across Midpen Preserves.
  - By Ward: Exhibit 2 shows, by District Ward, where grant-funded activities took place each grant cycle. Appendix 4 is a map of the seven wards.

Exhibit 2 - Locations of Grant-Funded Services by District Wards Each Cycle



- Across 22 Grants: Beneficiaries/participants locations.
    - Most grant-funded activities served beneficiaries/participants sourced from a variety of locations in the Bay Area. A few served beneficiaries/participants from specific location, which included East Palo Alto, San Jose, Half Moon Bay, and Pescadero High School.

Analysis

- The geographies (headquarters, service and beneficiary locations) were diverse across each cycle, which reflects the solid execution of RFP guidelines that state that pre-proposals and full proposals reviews will take under consideration, among other factors, "balance/distribution of funds by geographic area…".
- For field-based activities, the RFP guidelines state that they must be conducted within Midpen preserves, and projects that involve transportation costs for bringing participants to activities must be to and from activities on Midpen preserves.
    - A few proposal reviewer survey respondents commented having confusion about the requirement to conduct activities on Midpen land.
    - Only the full proposal asks for specific location of services.
- The data suggest that there was an improved outreach plan implemented that helped to diversify the pool of applicant prospects across the grant cycles.
- By wards, there has been less diversity, which reflects that Midpen preserves are predominately in Wards 6 and 7.
- The location of most beneficiaries/participants of grant-funded activities has been varied, but the data was not sufficient or accessible to determine how diverse the locations were.

Recommendations

- To continue to diversify the pool of applicants, review and refresh the outreach plan, identifying new communication platforms, especially in person and on the coast.
- Incorporate into the pre-proposal form an explicit request to identify the location(s) of the proposed activities.
- Clarify and/or confirm the RFP requirement that grant-funded *field* services be conducted on Mipen Preserves and communicate to proposal reviewers.

From: Public Comment Form
To: Clerk; web
Subject: 8/27 - Board Meeting: To be provided to the board of directors. (no limit)-6 -Coty Sifuentes-Winter -
Date: Tuesday, August 26, 2025 2:47:17 PM

EXTERNAL

Meeting Date *	8/27 – Board Meeting
Is this a comment about a specific board item? *	Yes
Agenda Item Number or Subject *	6
Please check one: *	In Favor
Where did you hear about this meeting? (check all that apply) *	• E-mail notification from Midpen
Name *	Coty Sifuentes-Winter
Organization (if applicable)	Midpeninsual REgional Open Space District
City of Residence *	SAN FRANCISCO
Email *	[redacted]
Comment Type *	To be provided to the board of directors. (no limit)
Comments to be provided to the board of directors *	Please see the attached formal comment letter which provides detail and context regarding my appreciation for the recent compensation adjustment and my continued request for a formal classification review of the Resource Management Specialist series. I hope this written input will help inform your decision-making and reinforce the importance of aligning job classifications with the current scope and responsibilities required to fulfill Midpen's mission.
Attach a File	comment_letter.pdf 85.45 KB · PDF

Re: Public Comment – Support and Request for Resource Management Specialist Classification Review

Dear President Cyr and Members of the Board,

I would like to begin by sincerely thanking the Board of Directors, General Manager Ana María Ruiz, and the Human Resources Department for your leadership and thoughtful engagement during the Classification and Compensation Plan review process. Your responsiveness to staff input, including the recent corrections to comparator classifications and the inclusion of the Resource Management Specialist (RMS) series in the current round of pay adjustments, is greatly appreciated.

The inclusion of a one-range increase for all RMS levels directly addresses a longstanding concern around internal salary alignment. This action is a meaningful step toward equity and retention, and I am grateful for your recognition of the technical expertise and leadership responsibilities embedded in the RMS roles.

That said, I respectfully submit that one critical element remains unresolved: the need for a comprehensive job classification review of the RMS series.

Why a Classification Review Is Needed

As noted in the August 27, 2025 General Manager's report (R-25-115), the District will begin reviewing class specifications that are several years old or have experienced significant duty shifts. We appreciate this proactive intent and ask that the RMS classification be prioritized in that process, for the following reasons:

- Measure AA has substantially transformed the role of Natural Resources staff, requiring us to deliver complex, multi-million-dollar restoration and vegetation management projects that were not previously part of our scope.
- RMS staff are now responsible for administering long-term, district-wide vegetation management contracts that support wildfire resiliency, biodiversity, and ecological restoration objectives.
- We are leading the District’s permitting strategy, including obtaining programmatic permits and authoring CEQA documentation that supports cross-departmental project delivery.
- Our roles increasingly mirror those of senior-level Planning and Capital Project Management classifications, both in technical complexity and fiscal accountability.

These shifts represent structural and programmatic evolution in how the District delivers on its land stewardship mission and they warrant a modernized classification that better reflects our current responsibilities.

Closing Note

Due to family obligations, I may be unable to attend this meeting in person, but I hope this written comment underscores both my gratitude for the progress made and my commitment to continuing this important dialogue. A timely and well-scoped classification review will ensure that our job descriptions align with the evolving mission, structure, and expectations of Midpen.

Thank you again for your time, your service, and your support of Natural Resources staff.

Sincerely,
Coty Sifuentes-Winter
Senior Resource Management Specialist
Midpeninsula Regional Open Space District

From: Public Comment Form
To: Clerk; web
Subject: 8/27 - Board Meeting: To be provided to the board of directors. (no limit)-6 -Gretchen Laustsen -
Date: Friday, August 22, 2025 3:09:38 PM

EXTERNAL

Meeting Date *	8/27 – Board Meeting
Is this a comment about a specific board item? *	Yes
Agenda Item Number or Subject *	6
Please check one: *	Neutral
Where did you hear about this meeting? (check all that apply) *	• E-mail notification from Midpen
Name *	Gretchen Laustsen
City of Residence *	Los Altos
Email *	[redacted]
Comment Type *	To be provided to the board of directors. (no limit)
Comments to be provided to the board of directors *	Please see the attached comment letter and distribute to the full Board.

DATE: August 22, 2025

MEMO TO: District Board of Directors for August 27, 2025 Board Meeting (Agenda Item No. 6)

FROM: **Senior Planner:** Gretchen Laustsen, Tina Hugg, Jared Hart; **Planner III:** Galli Basson, Ashley Mac, Erica Strohmeier, Tyler Smith, Melissa Borgesi; **Planner II:** Mattea Ottoboni, Brittany Wheatman, Cecelia Gerstenbacher; **Planner I:** Alyssa Cano

SUBJECT: FY2025 Compensation Study – Planning staff's concluding thoughts and request for title change

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Planning staff were informed on August 4th that the Planning Classification Study and District-wide Compensation Study process had reached its end. We are disappointed with Gallagher's conclusion, reaffirmed after the July 8, 2025 ABC meeting, that a hybrid match is not appropriate for the Planner II benchmark and that, based on the comparable municipal planning positions still being used, Midpen Planners will not be formally recognized in the Compensation Study for our capital project management functions.

The Classification Study conducted in FY2025 substantially updated the Planning job descriptions to include project management job duties, so it was a surprise that the updates resulted in no change to the makeup of the Planner II's comparable positions and no hybrid matches. Planning staff demonstrated to Gallagher in prior letters that the full suite of duties of the Midpen Planner role would be accurately reflected with a hybrid, since Planning's job description matches more than 50% of the functions and characteristics of many of Engineering & Construction's (E&C) comparable project manager positions and more than 50% of the functions and characteristics of Planning's comparable municipal planning positions. However, Gallagher has now provided feedback that a hybrid match should not be used to compare the Planner II benchmarked positions because Midpen Planners do not complete the full life cycle of a project, taking it to final design and construction, which Gallagher states is the phase with the highest risk or dollar value. As a result, Gallagher continues to match Planning staff to traditional, municipal planning positions that lack the project management duties related to public access capital projects, even though the bulk of Midpen Planning's work is in support of Measure AA and other capital projects.

Because Midpen Planners play a significant role for multiple years to advance projects to the final design and construction phase, we fundamentally disagree with the justification provided by Gallagher against hybrid matching and believe that Gallagher's rationale has not been consistently applied. Only at the conclusion of this process did Gallager share their latest reasoning that project management means managing projects through the entire life cycle from conception, preliminary and final design, construction/implementation and closeout. Further, according to Gallagher, Midpen's Planners only manage projects from concept to preliminary/schematic design (Hawthorns Area Plan and Skyline Field Office Rebuild projects being examples), and environmental review and clearance, and therefore the project manager comparable positions can only apply to E&C because E&C's Capital Project Managers carry the project to final design through construction and closeout, for which they receive a higher compensation in the market. Midpen Planners have not sought to be compensated at the same salary range as E&C's Capital Project Managers, but to be given credit and recognition for the portion of a project's life cycle that we do perform in delivering the projects we share with them.

Gallagher used the full life cycle project management rationale for E&C, too, and stated that they were only matched to positions that lead the final phases of capital project management and implementation, using this justification to remove one of E&C's comparators whose job description indicated that the position implements projects from beginning to end. However, it should be noted that at least three of E&C's remaining comparators are also full life cycle project managers who manage projects from inception to completion, and it is not clear why the rationale did not apply to these positions as well.

Gallagher's current rationale that is based on an entire life cycle of a project, which neither Planning nor Engineering & Construction claim to do, has been used by Gallagher to rationalize that Midpen Planners be recognized in the Compensation Study for only the planning functions performed by the Planner II series. The fact that Planning focuses on the first phases of a project's life cycle and E&C focuses on the last phases is not new. However, Gallagher is using it now as the rationale against hybrid matches when that same reasoning could have

just as easily been applied during last year's FY2024 Compensation Study effort. Gallagher's reasoning last year was that Planning's job descriptions were missing capital project management functions and needed to be updated before Planning staff's concerns about the municipal planner comparators could be addressed. That rationale now appears to be inaccurate since the project management functions that are now included in the job descriptions were still disregarded for the current FY2025 Compensation Study.

Gallager shared additional feedback that project manager positions typically have a broader role in the final phases of projects and these phases inherently carry additional cost implications, risk and safety concerns. Planners were originally told that the only data used to compare and benchmark positions was what was documented in comparator job descriptions. However, costs, risk and safety are not consistently documented, emphasized or prioritized in comparator job descriptions, and thus appear to be inferred weighted criteria. Regardless, it is important to note that the feasibility of a project and the scale of a project's budget are typically established in the early phases led by Planners (Skyline Field Office Rebuild as an example) and therefore, coupled with the challenges faced during public engagement and environmental review, pose a great deal of risk to the project's overall viability before it can even reach the final design and construction phase.

Planning staff feel that we provided sufficient data and information in our prior letters to support a hybrid match. The table below reflects the positions that Planners believe are appropriate for a hybrid match (functional or span of responsibility). We calculated that if a hybrid of these positions were to be used, the change in monthly salary (median + 10%) for the Planner II benchmark position is only an approximate increase of $135 at the top adjusted step. Using hybrid matches would have been a low-cost solution resulting in a significant boost in Planning staff morale and an accurate acknowledgement of their role.

Comparator Agency	**Suggested Hybrid** (planning/**project management functions)**
City of Santa Cruz	[Associate Planner II/ **Project Manager I**]
City of Mountain View	[Associate Planner/ **Parks Coordinator** (position not used for E&C)]
City of Palo Alto	[Associate Planner/ **Senior Planner** (span of responsibility)]
East Bay Regional Park District	[Planner/ **Project Coordinator**]
City of San Jose	[Planner II/ **Structure/Landscape Designer II**]
County of Santa Clara	[Associate Planner/ **Capital Projects Manager I**]
County of San Mateo	[Planner II/ **Capital Projects Manager I**]

Since the process has concluded and we expect no material changes to the Compensation Study's findings, at a minimum, Planning staff still **request that our classification titles be changed to Planning Project Managers to be consistent with the naming convention for Capital Project Managers**, and specifically recognize Midpen Planners for their project management responsibilities**.** This change seems reasonable, would not result in a salary cost increase to the District, and would more accurately reflect the breadth of our job functions.

We are grateful to the District for the updates to the compensation philosophy and to Human Resources for their work in facilitating the update to Planning's job descriptions to better reflect what we do. We will continue to serve the District and perform our planning and project management duties in the Project Planning and Delivery process regardless of our disappointment with the outcome of the Compensation Study.

Respectfully submitted,

District Planning Department staff

CC: Ana Ruiz, General Manager; Stefan Jaskulak, Chief Financial Officer; Candice Basnight and Rebecca Wolfe, Human Resources