



Midpeninsula Regional
Open Space District

R-25-155
Meeting 25-31
December 3, 2025

AGENDA ITEM 4

AGENDA ITEM

Implementation Status of the Financial and Operational Sustainability Model (FOSM) Refresh Recommendations

GENERAL MANAGER'S RECOMMENDATION

Review the implementation status of the Financial and Operational Sustainability Model (FOSM) Refresh recommendations. No Board action required.

SUMMARY

In 2023, the Midpeninsula Regional Open Space District (District) updated and refreshed the 2015 Financial and Operational Sustainability Model (FOSM) to ensure organizational capacity and focus for the successful implementation of the Measure AA commitments as well as new tasks that were not included or contemplated in the original study. This report provides a status update on the progress in implementing the 49 recommendations from the FOSM Refresh report (Attachment 1).

DISCUSSION

After voter passage of Measure AA (MAA) in 2014, the District embarked on a Financial and Operational Sustainability Model (FOSM) study in 2015 to evaluate existing workflow processes, staff capacity, and organizational structure and develop recommendations for supporting MAA projects in a financially prudent and sustainable manner. In 2023, the District refreshed the FOSM to ensure sufficient and deliberate capacity for fulfilling its Measure AA commitments and the expanded programmatic needs not previously envisioned back in 2015.

The FOSM Refresh report identifies 49 recommendations, which are being implemented in a phased approach across 3.5 fiscal years (from midyear Fiscal Year 2023-24 (FY24) to FY27). This phased approach is outlined in the FOSM Refresh implementation plan, which breaks down the 49 FOSM recommendations into 58 implementation actions (including breaking down the *implementation of the Coastal Management Plan* into distinct separate actions). This report, which is being provided annually at the December Strategic Planning retreats, provides an update on the status of the 58 implementation actions.

Status of FOSM Refresh Recommendations

On March 6, 2024, the Board of Directors (Board) received the FOSM Refresh Implementation Plan with actions phased by fiscal year and further by set of months within each fiscal year (Attachment 1).

The first phase began in November 2023, with the final phase planned to be completed at the end of FY27 (R-24-28). A total of 34 implementation actions (out of 58) were identified through October 2025. Based on a status review of these 34 actions, 20 (58.8%) are now complete and the other 14 have started and are in progress (41.2%). Table 1 below provides an overview status of all 58 implementation actions, with those scheduled through this reporting period shown in white cells and future actions scheduled for later phases shown in gray cells. Attachment 1 provides this information in greater detail and includes action items for future fiscal years that have been initiated ahead of schedule (a total of 12 ahead of schedule).

Table 1 -- Status of the 58 Implementation Actions by Phase and Fiscal Year

Total Number of Implementation Actions	Fiscal Year	Phase	Completed	In Progress
4	2024	2: Nov - Feb	4	0
5		3: March - June	2	3
11	2025	1: July - October	7	4
6		2: November - February	4	2
2		3: March - June	--	2
6	2026	1: July - October	3	3
7		2: November - February	1	6
7		3: March - June	2	2
4	2027	1: July - October	1	--
4		2: November - February	--	--
2		3: March - June	--	--

Many of the “In Progress” FOSM recommendations have had significant traction made towards completion. For example, the recommendations to “continue pursuing blanket permits” and to “centralize resource agency regulatory permitting functions” have been advanced by the recent addition and hiring of a Resource Management Specialist III and through securing a San Mateo County Master Permit in December 2023 for near-term, capital projects and establishing the Open Space Maintenance and Restoration Program (programmatic permit) for routine field work. Furthermore, since November 2023, the District has recruited for and hired 11 new Rangers to fill newly approved positions and prior vacancies.

Other “In Progress” recommendations are multi-year projects. Examples include: exploring self-regulating authority, which has moved forward with the recent Board adoption of the California Building Code; implementing project management software, starting with completion of an internal assessment of needs and gaps; and establishing a Coastal Field Office, which reached a critical milestone with the purchase of a coastal commercial/visitor serving property.

Status of FOSM Position Hirings

One of the significant objectives of the FOSM Refresh effort has been to recalibrate and scale up District capacity to successfully deliver on Measure AA commitments and new emerging demands. The 2023 FOSM Refresh proposes a total staffing growth over a 10-year timeframe of 93 new positions, 33 of which are prescribed through FY27. Per Table 2 below, staff growth is ahead of schedule. Recruitments through the end of the reporting period are shown in white cells; gray cells show recruitments for future phases.

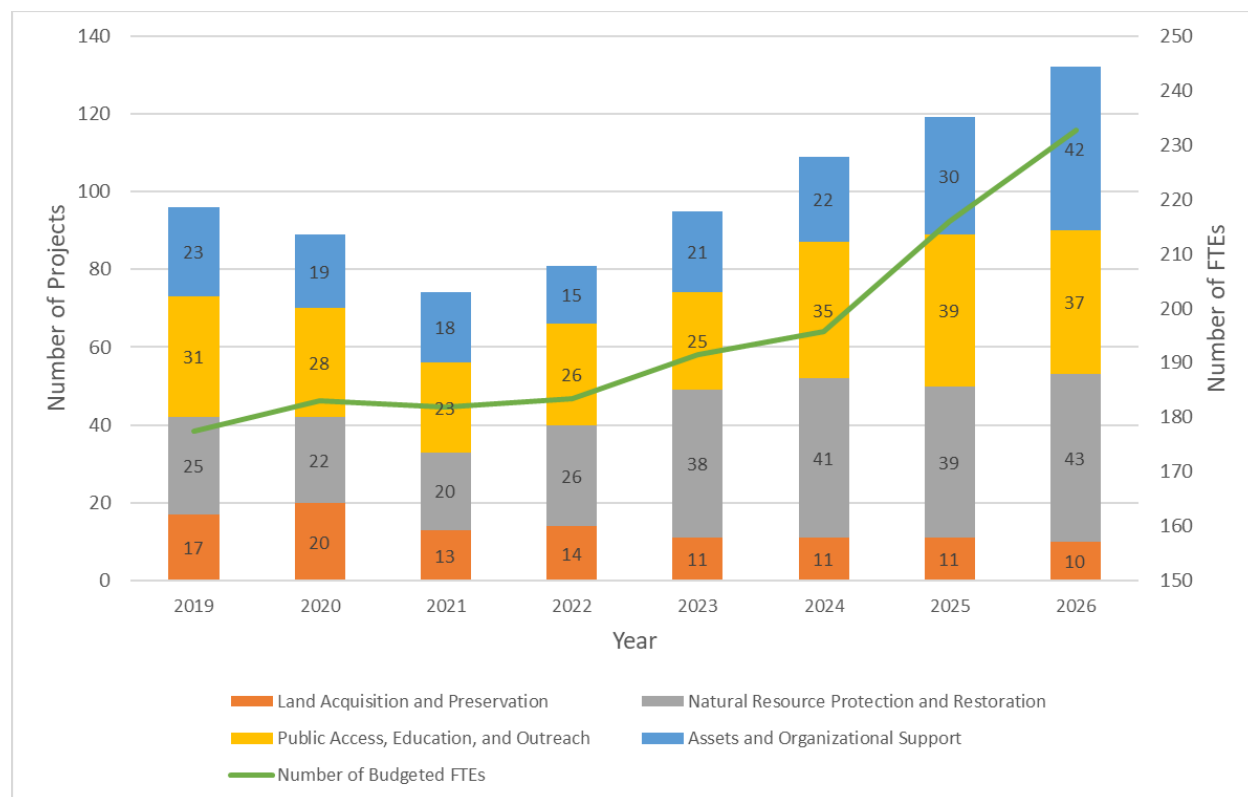
Table 2 – Status of Recruitments by Fiscal Year by Business Line

Fiscal Year	Business Line	Total Number of New FTE Positions	Complete	In Progress
FY24	Project Planning and Delivery	4	4	--
	Visitor and Field Services	8	6	2*
	Administrative Services	2	2	--
FY25	Project Planning and Delivery	1	1	--
	Visitor and Field Services	4	4	--
	Administrative Services	4	4	--
FY26 Jul-Oct	Project Planning and Delivery	0	--	--
	Visitor and Field Services	2	2	--
	Administrative Services	0	--	--
FY26 Nov-June	Project Planning and Delivery	0	--	--
	Visitor and Field Services	5	3	2
	Administrative Services	0	--	--
2027	Project Planning and Delivery	0	--	--
	Visitor and Field Services	3	1	--
	Administrative Services	0	--	--

*Note: The two “in progress” recruitments represent two unfilled ranger positions.

As a reminder, the additional staff recommended in the 2023 FOSM Refresh is a catch-up for (1) new programs (e.g. fire/fuel management and rangeland management) that were not contemplated in the original FOSM study in 2015, (2) implementation of the Coastal Management Plan, and (3) to position the District for organic growth resulting from the additional maintenance and management of new trails, acreage, and open public areas.

The graph below illustrates how at first the number of projects outpaces the number of full-time equivalent positions (FTEs). After the 2023 FOSM Refresh recommendations begin to be implemented, the growth of projects and the growth of FTEs realigns. Of course, this comparison does not capture the increase in operational (non-capital project) work, such as routine trail and vegetation maintenance, patrol, natural resource management, etc., that are budgeted within departmental operational budgets.



FISCAL IMPACT

Projects to implement the FY27 FOSM recommendations will be included in the list of proposed project priorities that the Board will consider as part of the March 2026 Board Priority Setting Retreat. The associated budgets will be folded into the proposed Budget and three-year Capital Improvement and Action Plan (CIAP).

New FOSM-recommended positions planned for FY27 will also be folded into the annual budget after reconfirming the long-term affordability according to the Controller's 30-year Cash Flow Model. These positions, including summary job descriptions, would be presented first to the Action Plan and Budget Committee during the spring and subsequently to the Board as part of their first FY27 Budget hearing.

PRIOR BOARD OR COMMITTEE REVIEW

January 10, 2024: The Board received the FOSM Refresh Report and the implementation prioritization list of the FOSM Refresh recommendations ([R-24-05](#), [minutes](#)).

PUBLIC NOTICE

Public notice was provided as required by the Brown Act.

CEQA COMPLIANCE

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

Attachments:

1. FOSM Refresh Priorities – Implementation Plan with Status Update

Responsible Department Head:

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FOSM Refresh Priorities

Recommendation	Status	FY24 - Midyear Implementation	Lead plus Key Support	Business Line	July - October	Nov - Feb	March - June
39	Complete	Add HR analyst	Candice	HR		X	
6	Complete	Add two Planner IIIs	HR, Jane	HR		X	
15	Complete	Add Senior Capital Project Manager	HR, Jay	HR		X	
23	Complete	Establish 2 crews assigned to RM and WFRP	HR, Brandon	HR		X	
7	Complete	Add Capital Project Manager II	HR, Jay	HR			X
31	In Progress	Add two regular Rangers (leverage existing recruitment effort)	HR, Matt	HR			X
37/40	Complete	Convert ½ time HR Tech and ½ Accounting Tech to full time	Candice, Rafaela	HR			X
12	In Progress	Explore self-regulating authority	Ana, Hilary, and Josh	GMO			X
35	In Progress	Begin the 2025 IPM Update	Coty	VFS			X
		FY25 First Full Year 1 Implementation	Owner		July - October	Nov - Feb	March - June
1	Complete	Next Round of Coastal Management Plan recruitments - Admin Assistant	HR, Kirk, Allen	HR	X		
1	Complete	Next Round of Coastal Management Plan recruitments - Planner III	HR, Jane	HR	X		
1	In Progress	Next Round of Coastal Management Plan recruitments - Pursue creation of Coastal Field Office	Allen and Kelly	PPD	X		
31	Complete	Add a lead Ranger	HR, Matt	HR	X		
47	Complete	Add IST Mgmt. Analyst	HR, Casey	HR	X		
2	In Progress	Invest in improving project management practices (assessment/training)	Susanna	PPD	X		
11	In Progress	Continue pursuing blanket permits	Brian, Kirk, David	VFS	X		
18	In Progress	Evaluate impact of new initiatives through district-wide/mission lens	Ana	GMO	X		
44	Complete	Continue participation in SM County Regional Training and Development Consortium	Stefan, Candice	FAS	X		
49	Complete	Ensure GIS Master Plan (under preparation) evaluates need for additional resources	Stefan, Casey, Jamie	FAS	X		
33	Complete	Add Vol Program Lead	HR, Matt, Jen, Brandon	HR	X		
1	Complete	Next Round of Coastal Management Plan recruitments - Open Space Technician	HR, Brandon	HR		X	
38	Complete	Add Senior Procurement Technician	HR, Sarah	HR		X	
46	Complete	Add App Programs Manager	HR, Casey	HR		X	
9	In Progress	Adjust internal review authorities	Stefan, Maria, Hilary	GMO		X	
10	In Progress	Adjust administrative contract change order approval autho	Stefan, Maria	GMO		X	

36	Complete	Add Budget and Analysis Supervisor	Stefan, Rafaela	ADM		X	
16	In Progress	Solidify project scope early in planning process	Susanna, Jane	PPD			X
45	In Progress	Add salary to job descriptions	Stefan, Candice, HR	FAS			X
FY26 - Year 2 Implementation			Owner		July - October	Nov - Feb	March - June
25	Complete	Establish new Fleet and Facilities Department - Add F&F Manager	HR, Brian, Brandon	HR	X		
26	Complete	Rename Land & Facilities Dept to Land Stewardship Dept	Brian, Brandon	VFS	X		
1	Complete	Next round of Coastal Management Plan recruitments - Resource Management Specialist I/II	HR, Kirk	HR	X		
14	In Progress	Develop in-house conceptual design capacity	Susanna, Jay	PPD	X		
21	In Progress	Evaluate resource loading tool for CIAPs and modify as needed	Stefan, Rafaela	FAS	X		
48	In Progress	Evaluate IST job descriptions (move to FY25 if capacity allocated)	Stefan, Candice, Casey	FAS	X		
29	In Progress	Establish new Fleet and Facilities Department - Add Fleet Manager	HR, Brian, Brandon/New Mgr	HR		X	
25	Complete	Establish new Fleet and Facilities Department - Add Admin Assistant	HR, Brian, Brandon/New Mgr	HR		X	
3	In Progress	Explore options for new Project Management Tool	Susanna	PPD		X	
13	In Progress	Centralize Resource Agency regulatory permitting function	Brian and Kirk	VFS		X	
17	In Progress	Incorporate post-construction staff time in scheduling	Susanna, Brian, Brandon, Jay, Kirk	VFS		X	
20	In Progress	Evaluate admin tasks that can transfer from project managers to admin (new/existing) staff	Stefan, Susanna, Brian	GMO		X	
42	In Progress	Expand career ladders	Stefan, Candice	FAS		X	
24	In Progress	Add RM Specialist I/II	HR, Brandon	HR			X
27	Complete	Establish new Fleet and Facilities Department - Add Fac Maintenance FTE	HR, Brian, Brandon/Michael	HR			X
30	Complete	Establish new Fleet and Facilities Department - Add Contract Management Position	HR, Brian, Brandon/Michael	HR			X
19	In Progress	Provide staff training for new program areas	Stefan	FAS			X
22		Conduct project close-out reviews to document full project time to inform future resource loading efforts	Susanna, Brian, Brandon, Jay, Kirk, Jane	PPD			X
41		Expand succession planning efforts	Stefan, Candice	FAS			X
32		Identify goals and objectives for the roles of Rangers	Brian, Matt, Ana	VFS			X
FY27 - Year 3 Implementation			Owner		July - October = 1	Nov - Feb = 2	March - June = 3
1		Next round of Coastal Management Plan recruitments - Supervising Ranger	HR, Candice, Matt	HR	X		
1	Complete	Next round of Coastal Management Plan recruitments - Resource Management Specialist I/II	HR, Candice, Kirk	HR	X		
1		Next round of Coastal Management Plan recruitments - Open Space Tech	HR, Candice, Micheal	HR	X		
5		Identify levels of public engagement by project type/condition	Susanna, Jane, Jay	PPD	X		
3		Purchase/train on new Project Mgmt. Tool	Stefan, Casey, Susanna	FAS		X	

ATTACHMENT 1

4		Establish PAWG formation criteria	Susanna, Jane	PPD		X	
34		Develop Volunteer Training Program and software system	Brian, Casey, Jen , and Ellen	VFS		X	
8		Improve project record keeping	Susanna	PPD		X	
43		Establish internship/apprenticeship program pipeline with lo	Stefan, Candice, and Katie	FAS			X
28		Evaluate general AO building management requirements and staff accordingly	Brian, Stefan, Joe, and Brandon	VFS			X