

Attachment D: Operator Business and Programming Plan**BUSINESS PLAN 2026-27 FRIENDS OF BEAR CREEK STABLES**

EXECUTIVE SUMMARY

This Business Plan integrates the operation, program, and financial plans required for the initial 2-year term of the agreement between Friends of Bear Creek Stables (FBCS), a California nonprofit public benefit corporation, and the Midpeninsula Regional Open Space District (District), a California Special District. Successful execution of this plan will provide the foundation for expanded programming and use of new facilities to be developed by District under further optional extensions provided for in the agreement.

The success of this business plan relies on the partnership between FBCS and the District. The terms of the partnership are described in the Agreement for Operation of Bear Creek Stables (Agreement). During the first two years of operation, FBCS will begin to provide low-impact equine- and nature-based activities for the general public. Concurrently, FBCS will continue to operate a horse boarding facility with current owners having the option to become part of those public programs or to relocate. To ensure that all equine-related activities are safe and have a low impact on the site, and because of anticipated construction as District develops the infrastructure, no more than 30 horses will be kept at the stables in the first two years. More horses may be added following an extension of the contract.

Most programs will be free or reduced cost to attract diverse sectors of the public and underserved communities. In addition to equine-related programs, nature-based activities will span a wide spectrum of interests, from birding to yoga to youth programs. Programs will generally take place within the boundaries of the Bear Creek Stables in the Bear Creek Redwoods Open Space Preserve, with some extending onto the trail system of the greater Preserve. Programs in the preserve must comply with District permit regulations. Initially, programs will be offered within the limits of the existing facilities while developing a foundation for additional programs that can be offered consistent with further facilities improvements.

During this period, the Board of Directors of FBCS will be working to transition from a working, operations-focused board to a policy-focused board relying on paid staff for most needs. The Board will be aided in this by a group of expert Advisors on such issues as pedagogy, horse care and stable operations, architecture, field engineering (including water and electricity), development and public relations.

Operations will begin with more than \$250,000 of donations and net revenue available, providing for the maintenance commitments and funds described in the Agreement will be met. Projected initial two-year revenues including program fees, donations, underwritten programs, grants, and boarding fees, are estimated to total \$950,671. Expenses, comprising cash outflows for feed, maintenance, staff salaries, insurance, and related expenses are estimated at \$893,409. The accuracy of these estimates is highly dependent upon FBCS ability to work quickly and effectively within the constraints of the current facilities that are in need of significant repair. If these targets for income and expenses are met, the ending balance of unallocated funds would be approximately \$300,149. A large portion of that balance would be available for program development and facility improvement. Programs are estimated to serve 1,500+ people, with at least 30% receiving fee waivers or reductions to assure participation by financially disadvantaged groups.

DESCRIPTION OF ORGANIZATION

Structure

Friends of Bear Creek Stables (FBCS), a California not-for-profit corporation, was formed in 2013 and received its 501(c)(3) non-profit determination in 2014. It is governed by a five-member Board of Directors (FBCS Board), all of whom are volunteers and serve without compensation. For about 10 years, FBCS provided some equine- and nature-based educational programs at Bear Creek Stable. The annual budget has always been less than \$25,000.

In June 2024, the FBCS Board voted to help District keep Bear Creek Stables (BCS) open as an equine and nature-based facility. The offer was again made in November 2024 to include a substantially expanded scope and is anticipating a much broader range of programming as District completes planned infrastructure improvements. The same five FBCS Board members who voted to do so are still serving as a volunteer “working board” – without pay.

Since the decision to expand the role of FBCS into the management of the stables and the development of a greater range of public programming, a number of people have been asked to participate as Advisors to the FBCS Board. All are volunteers who serve without compensation. Also, one paid staff member has been hired to clean and feed the horses at BCS under the terms of the interim agreement between District and FBCS.

Over the next two years, as revenues allow, the FBCS Board plans to transition from a working Board to a policy-focused Board that oversees a paid staff and expanded corps of volunteers, while remaining themselves unpaid volunteers. The roles of Advisors will evolve as programs and staffing develop.

Staff Responsibilities

As FBCS currently has a “working Board” and key Advisors, all of their roles are described here, together with paid staff.

Rick Parfitt, President, acts as Chief Executive, with overall responsibility for contract fulfillment and compliance, policy direction, boarder relations, and fundraising. He presides at all meetings of the FBCS Board and is authorized to execute contracts and sign other instruments that are authorized by the Board

Melany Moore, Vice President, assists the President in all responsibilities, acting where necessary in his absence. Her primary focus is on the operations of the stable and boarder relations. She is helping manage the care of horses at BCS under the interim stables operating contract that has been in place between District and FBCS during 2025.

Karen Read, Treasurer, is responsible for receiving, depositing, and disbursing funds; maintaining correct accounts and financial records; tax filings. She is also responsible for compliance filings with federal and state offices.

Marcelle Colonna, Secretary, is the custodian of the records of the corporation, including articles of incorporation, bylaws, and meeting minutes. She distributes notices of meetings, takes and distributes minutes, and maintains duly executed documents of the corporation, including certificates of insurance. She is currently working on fundraising with a group of volunteers and will be applying her 43 years of experience teaching special needs children to identifying and developing programs for diverse groups at BCS.

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Peggy Kauffman, Director, contributes lifelong experience as an equestrian, including many years as a former boarder at Bear Creek Stables. She is a retired educator who has been aiding in developing policies for the operation of the stables and upcoming development of programs. She is also leading a working group of volunteers on Public Relations and Community Outreach.

Federico Jose Trejo Gomez, (staff) has more than 30 years of experience caring for horses. He is attuned to the health of each horse in his care, adjusting feed and care as needed and alerting barn management to potential or developing problems with the horses or facilities.

Anita Enander, Advisor, provides expertise on board governance and effectiveness, tax compliance, best practices for horse care, and effective collaboration with public agencies.

Linda Rubio, Advisor, provides expertise on best practices for operating a horse facility with public programs (forty years of experience doing so at a horse boarding facility on Golden Gate National Park lands in Marin County).

Mike Bushue, Advisor, is a lifelong equestrian and engineer, has expertise in equestrian site design, facility and infrastructure, horse care and safety, code compliance, emergency planning and response, collaboration with various San Mateo County horse associations.

Rachael Parakh, Advisor, provides expertise in public relations, graphic design, fundraising, collaboration with local horse associations. She is on the Board of the Santa Clara County Horseman's Association.

Pam Warren, Advisor, is an architect with experience in integrating program operations with facilities (existing and planned). She is a current boarder at BCS who also acts as liaison between boarders and FBCS Board.

Cindy Clark, Advisor, is a District-trained docent. She has aided in developing relationships with prospective program partners.

Wendy Jensen, Advisor, is a special education professional who works with high school students in under-served communities.

Elizabeth Sharkey, Advisor, is a long-time middle school teacher with expertise developing nature-based learning programs.

Megan Mahoney, Advisor, is a 5th grade teacher and backpacker who advises on pedagogy and program development.

Kris Hill, Advisor, is an elementary special education teacher for reading, advises on pedagogy for incorporating science in programs.

Neil Savage, bookkeeper, is our volunteer bookkeeper with extensive experience working with non-profits.

Additional staff will be added depending on the timing of program ramp-up and completion of facility improvements. Timing of program ramp-up depends greatly on date of initial contract execution. Therefore, staffing additions must remain flexible, and the Board and Advisors are prepared to fill these roles for at least 6 months following contract execution.

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Responsibilities for program planning and for barn management will initially be done by FBCS board members and/or advisors. These responsibilities will transition to paid staff during the first year. The positions may be filled as part time for each of the two responsibilities (Equine Facility Manager and Program Director) but may be filled by one full-time person if the ideal candidate is found who can fulfill both position responsibilities. The Equine Facility Manager is responsible for intake and care of all horses and the direct conduct of equine-related programs. The Program Director is responsible for scheduling and managing all programs, although direct oversight of equine-related programs is done by the Equine Facility Manager. More detailed position descriptions are appended to this Business Plan. The Equine Facility Manager may be offered housing, if a temporary trailer can be provided. Although a small home is planned in the District use permit application, we do not anticipate such being available during the 2-year initial term of the contract, and for some time thereafter. These staff leaders will become part of the Management Team described further below.

MANAGEMENT TEAM COMPOSITION

The core management team is the five-member working board of directors of Friends of Bear Creek Stables. This section expands on the specific competencies of some of the above-described Directors (Officers), Advisors, and Staff, with special emphasis on those who have managed a stable and/or worked with contractors on stable improvements. Most were deeply involved in the Ad Hoc process during 2024. The team may be expanded as Equine and Program positions are filled (see prior section).

Rick Parfitt (President, FBCS) has a fifty-four-year career of working with local, state and federal agencies in addition to working both in the private sector and two non-profit organizations. Most of his career has been spent doing private and publicly funded research in physics and state-of-the art systems. In addition, as an elected School Board member he has both training and experience with Board Governance. He is a founder of the Fire Safe Council with direct experience working with contractors and public agencies.

Melany Moore (Vice President, FBCS) lifelong equestrian, holds a BA from the University of Santa Cruz with a degree in Environmental Studies. A lifelong equestrian, she has experience with best practices in equine welfare and in animal husbandry with goats and chickens. She has experience in Integrated Pest Management (IPM), pasture restoration, beekeeping, pollinator gardens and native plant propagation. She has managed numerous volunteer programs, events, and activities involving horses. She has been acting as Barn Manager since January 2025.

Karen Read (Treasurer, FBCS) is a long-time equestrian whose primary occupation is training and exercising race horses and managing a training stable.

Marcelle Colonna (Secretary, FBCS) began riding ponies and horses at age 10 and, as an adult, learned about the various disciplines from Dressage to Natural Horsemanship. She is a former boarder (2017-2022) who knows the Bear Creek Stables facility well and has been involved in program development and delivery at BCS. With a BA in Education and MA in Special Education, she taught children with special needs for 43 years before retiring from Moreland School District in 2019.

Peggy Kauffman (Director, FBCS) has deep experience as an equestrian and at equine events. As an educator and former boarder, she will contribute special knowledge of the stables both for program development and facility improvements.

Linda Rubio (Advisor, FBCS) has been a riding instructor, stable owner and manager for over 40 years. She previously managed the public stables at Golden Gate National Recreational Area in Marin County.

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Mike Bushue (Advisor, FBCS) lifelong equestrian, long-time volunteer with various San Mateo and California state trails and facility development for equestrian use. Mike is an engineer with experience in field design of horse facilities and infrastructure (stalls, water supplies, solar power, trail maintenance and improvement).

Pam Warren (Advisor, FBCS) lifelong equestrian, long-time boarder with comprehensive knowledge of Bear Creek facilities; architect with experience in facility planning and design, infrastructure, and construction management.

Anita Enander (Advisor, FBCS) managed a private barn with 14 horses in training; oversaw construction of new paddocks and stalls; was a riding instructor for horse owners and beginners (especially children 7-12); developed and conducted multi-day riding camps for children with limited English. She also has deep experience as a top-level program manager and business consultant.

Neil Savage (Advisor - Finances, FBCS) with a MBA from MIT, Neil brings experience with re-engineering of office and financial processes to optimize use of cloud-based services, complex data analysis, data presentation, business analysis, optimization of computer usage, and design of intricate spreadsheets.

The organization and team described in the two sections above already has a proven record of success in growing the organization and accomplishing its goals. Since January 2025, FBCS has successfully provided feed and care for the horses at BCS – fulfilling the requirements of the interim agreement with District. As of December 2025, FBCS, through its Board, Advisors, and volunteers, has raised cash donations of \$270,000, booked revenue for services of \$80,000, and received in-kind donations of \$180,000. In-kind donations have gone into developing the business. Those activities have included a fund-raising campaign, web site development, social media, expanded financial accounting, setting up a payroll system, obtaining requisite insurance, and recruiting talented experts in several fields to help with operations. Additional in-kind donations went into caring for the current horses boarded at the stables.

IMPLEMENTATION APPROACH

Time and cost efficiencies

Throughout the initial period of this contract, FBCS will begin offering programs. As stewards of our donors' funds and with responsibility for the public lands at the Stables, it will be incumbent on the board and volunteers to be efficient in our selection of programs and use of the facilities. As described above, management will transition from Board/Advisors (uncompensated) to paid staff as income allows. Positions will be filled on part-time basis until revenue justifies converting to full-time positions and/or program and equine positions may be combined if a suitable applicant is found. Volunteers will continue to be used for programs wherever possible. Based on prior experience, many volunteers are available to offer programs and tours and to provide the additional staff needed for some equine programs (e.g. "walkers" for very young children). A key theme for the FBCS Board is to offer the best programs as low- or no-fee to the public, while minimizing impact on the property.

Reducing operational waste and greenhouse gas emissions.

Animal waste will be removed from the property on a regular basis. Consistent with current practice, for the first two years manure will be stored briefly in a truck that will remove it from the property to a composting facility. Removal cycle will depend on number of horses but will be done with frequency needed to minimize emissions on-site.

Promoting diversity, equity, and inclusion

FBCS Directors and volunteers have already met with contacts in schools and special equine therapy programs to identify underserved and economically disadvantaged populations and the types of programs that would be appropriate and inspiring for them. During the Ad Hoc process, the Programs team developed a list of program providers that reach these groups, some of which are over-subscribed and will refer people to Bear Creek or hope to develop “satellite” programs to accommodate their waiting lists. Among targeted groups are: schools with underserved and or economically disadvantaged populations, including Title 1 schools; children and adults with autism, ADHD, and similar diagnoses who are therapy candidates; veterans and others with physical limitations and/or PTSD.

The four education-based Advisors will use their networks to identify additional populations inside the District boundaries. We are also using contacts with service clubs that have programs and projects directed to such populations (e.g. Kiwanis, Lions, Rotary) with plans to partner with them for programs. All are informed of our commitment to offer low- or no-fee programs.

We will also be reaching out to senior members of our community through senior centers and senior care facilities that provide outreach programs.

We will specifically recruit volunteers from among underserved and economically disadvantaged populations, using targeted high schools and junior colleges. We will also contact the 400+ nonprofit organizations certified by the Sobrato Center for Non-profits (SCNP) to identify volunteers and to seek funding for stipends that would attract economically disadvantaged youth.

Building cooperation among boarders, the public, and District

Communication is the key to building cooperation. Actions taken in 2024 have already built a foundation of cooperation between boarders and FBCS. These include monthly meetings with boarders, “walk-around” informal get together with boarders and FBCS Directors, email/text announcements and news, and social events (“potlucks”). FBCS will build on these relationships in the transition after signing the Agreement so boarders will readily raise issues to FBCS for resolution that were previously the purview of District.

The relationship built between two FBCS officers and District staff during the contract negotiation has been strengthened by further communication on operational issues. A FBCS Director will be tasked to coordinate with District in a timely fashion on any issues that arise either with the property/facility or with the public.

In addition, FBCS has reached out to the public through the news media and has benefited from several local stories with positive commentary. The network of donors is broadening communication with the public through referrals and the opportunity to address community groups about BCS. These efforts will expand to include the public and private schools and the joint Los Gatos-Saratoga Community Education and Recreation joint powers authority, both to increase public awareness of the programs and to expand the information network to reach more people to participate. All communications from FBCS emphasize that the BCS programs are only possible because of the willingness of District to make BCS available for programs.

Notices and signage will be posted when appropriate to educate the public and boarders on policies. A physical or electronic suggestion box and/or wish list will be offered to boarders.

Quality of service and knowledge of personnel for the management and operation of the Stables

Two sections above, “Description of Organization” and “Management Team Composition,” detail the knowledge and experience of personnel who will continue operation and oversight of the Stables. FBCS is committed to further improving the delivery of services to boarders. FBCS anticipates that it will engage a part-time Equine Facility Manager and a separate Program Director to develop, schedule, and manage all programs. Both will be paid staff positions filled during the first year of the Agreement. Both will have responsiveness and quality measures as part of their job descriptions and expectations.

Promoting health and safety of horses

Animal health and safety are top priorities. Implementing Animal Health and Biosecurity protocols demonstrate that commitment. All horses require the specified health certificate prior to intake and will be further screened upon arrival. FBCS will execute a service agreement for an on-call veterinarian, who will make twice yearly inspections of the premises, offer immunization clinics, and be available under the conditions of the Boarder Agreement to provide needed services for individual horses. The Boarder Agreement provides for FBCS to take appropriate action if a horse is ill or injured. Those who care for or oversee horse-related activities will be expected to make safety for horses and people their top priority. Interactions between horses and members of the public will be strictly supervised by staff or volunteers, all of whom will receive training on horse-human safety prior to beginning their work at BCS.

MARKETING AND FUNDRAISING STRATEGY

FBCS demonstrated the ability to raise a substantial amount of funds (\$250,000) and receive in-kind donations (\$180,000) PRIOR to signing an Agreement with the District. This reflects the trust that many people and organizations have in the Directors of FBCS. These donations form the foundation for additional revenues, as detailed below. Further, FBCS has demonstrated successful use of the media (print and social) to inform the public about its plans.

Marketing strategies to promote programming and awareness

Programs will be a moderate source of revenue, with many programs offered during the first two years at no- or low-fee. Outreach efforts will focus on: local media, service clubs, other nonprofits with aligned interests (e.g. equine and environmental), private and public schools, Los Gatos-Saratoga Education and Recreation, associations that support disadvantaged and learning disability children, Veterans groups, Senior homes, and support organizations. FBCS already has contact with all such groups. Volunteers have already written and are prepared to write targeted articles and newsletter promos for specific programs.

Fundraising strategies to secure operational capital funds

More than 120 individuals and a dozen businesses and organizations contributed to raising the \$250,000 operating capital that was required to execute the Agreement. Most have indicated a willingness to provide additional capital once programs are started. FBCS has also identified additional strategies for raising operating capital. There are three major streams: (1) unrestricted donations; (2) underwriting specific programs (entirely, or to reduce fees); and (3) restricted donations for specific facility improvements or equipment.

PROGRAMMING APPROACH

General Programming Requirements

This section describes the programs FBCS plans to introduce during the initial two years of the contract. With the exception of programs designed and limited for safety reasons to participants with special needs, all programs will be open to the general public, including an outreach to diverse and underserved communities. All programs will be provided in a safe, environmentally sustainable, and sensitive manner in compliance with local and state codes, regulations, and permit conditions. Initially, local trainers and those already certified to provide special needs therapy will be engaged to provide mounted programs.

In conformance with District requirements, the cumulative maximum number of program participants is 40 per day. FBCS will obtain special, written permission from District for any modifications that might be needed over time. At least 30% of all programming activities will be free or discounted fee; of those, two-thirds (20% of all programming activities) will be free or discounted at least 50% for underserved communities.

Friend's objective is to engage a minimum of 1,500 participants each year of the first two years through activities conducted at or within the Stables, reflecting intentional visits for the purposes of participating in programming and those attending tours of nonpublic areas of the Stables. To ensure a distinct and impactful experience, all activities will emphasize the unique benefits of integrating horses within a protected nature preserve. This goal excludes casual outreach to current visitors

All participants will sign a liability waiver.

FBCS will retain all signed waivers and make them available to District upon request.

FBCS will conduct an average of at least two public tours per month of areas within the Stables that are not typically accessible to the public. Tours may be designated as hike-in only at Friend's discretion.

Increasing public exposure

The primary focus of programs is to provide the public with exposure to horses, nature, and low impact uses of BCS. In the first two years of operation, FBCS will develop and offer a complement of programs from among the general categories shown below. Initially, programs are expected to be low-cost for both FBCS and attendees to maximize public exposure and develop community awareness of the expanding opportunities to experience nature at BCS, while minimizing costs to FBCS as it further develops the donor base.

All participants will be made aware of the importance of minimizing impact on the existing property, including staying on trails and designated paths, not disturbing existing plants and wildlife, packing out all trash, and generally respecting the natural landscape. During nesting season, special attention will be paid to not disturb nests (e.g. barn swallows, killdeer).

FBCS may partner with outside trainers and other non-profits, including those who offer hippotherapy programs, for some of the programs. Programs provided by such outside providers will be in accordance with the requirements of this Agreement., and all participants will be required to sign relevant waivers of liability. Programs will be provided by licensed practitioners when required by law.

Categories of programs

The following categories of programs are planned for the first 2 years:

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1. Nature walks/lessons, including birding, character of the riparian woodland (including native plants, wildlife, and insects), pollinator garden.
2. Barnyard animal interactions (in conformance with District approval of temporary pens and type/number of animals)
3. Equine interaction (introduction to horses; unmounted activities; unmounted therapy programs, including veterans' programs)
4. Equestrian programs (mounted lessons; camps; therapy programs, including veterans' programs), in conformance with requirements shown below ("Riding programs")
5. Arts and crafts
6. Guided tours
7. Scouting "badge" programs and other youth club activities
8. Volunteer and community service projects
9. School field trips
10. Senior activities and/or field trips
11. Community and corporate group events

Details regarding planned programs for each category follow (initial number corresponds to program number in the list immediately above).

1– Hilltop Portable Bench Project – Tranquility Hill (future location of main water tank)

Brief Description: Very low impact, cornerstone project that will enable several other programs to take place.

This project is already funded from \$1750 in donations. Use is to be restricted to a small area for low impact activities like nature journaling, yoga, small art class, etc.

Dependencies: Two to three portable, stout and secure benches are to be positioned to demarcate the area of use and provide participants an area where they gather and sit together.

Number of Participants: Further described under other programs that would use this site. Maximum number of participants at any one time limited to 12, or up to 20 for supervised, low-impact activities such as yoga. First year – not more than two groups per week (max. 600 participants for year); second year – up to four groups per week (max. 1200 participants for year).

Revenue and Costs Estimates: Low cost to implement for small groups that can sign-up online. Fees for first year to be set at \$20 per person with instructor receiving 50% of revenue for supervised programs. For potential revenue see below "Nature Journaling – Other."

Safety/Insurance: Low impact, low risks, and no anticipated increase to current non-profit liability insurance.

1 – Kiosk Educational Stations (Subject to District approval)

Description: Construct up to eight Educational Stations like the stations used at Hidden Villa to provide educational material, program information, maps, and safety information. Stations shall be weatherproof, portable, and located at key access points and sites where educational programs are held.

Facilities to be used: All sites will be within the stables area., stables trail entrance, lower program meeting areas, and upper program meeting areas.

Dependencies: Building material shall be consistent with District practices. Structures shall be relocatable, fire resilient, weatherproof, low impact, and designed to blend into the natural background.

Number of Participants: All visitors including special accommodations for visitors with special needs.

Revenue and Costs Estimate: Estimated cost per site - \$1,200. Promotional material, QR Codes and easy access to social media will contribute to our ongoing outreach to promote, expand, and extend support for our programs.

Safety/Insurance: No impact to insurance.

1– Birding Program

Description: Work with the Santa Clara Valley Bird Alliance (SCVBA) to provide SCVBA/FBCS docent led programs, including bird watching, educational programs for youth, and bird house building.

Facilities: Ambassador site, Group Area, and adjacent trail system

Dependencies: Need to coordinate with several groups including SCVBA, Scouts of America, Girl Scouts, and local bird enthusiasts

Number of Participants: 15-25 per group, 12-20 groups in year 1; 24 groups in year 2.

Revenue: \$10 per person or ability to pay. Estimated \$283 year 1; \$283 year 2.

Safety/Insurance: SCVBA/FBCS Docents provide safety. No impact to insurance.

1 – Pollinator Garden (Subject to District Approval)

Description: Expand existing “native plant” garden to provide pollinator habitat. Serves as visiting point for tours and school groups and can be focal point for programs focusing on bird/insect/plant habitat and low-impact gardening.

Facilities: Adjacent to main pathway and current hay storage in upper area (expands on existing garden)

Dependencies: Volunteers to plant and maintain. Requires District approval of all plants; plants must be procured from approved nurseries. Soil or seeds need to be Phytophthora free and from certified providers.

Number of participants: Pass-by focal point for tours and small groups; focal program of 10 participants for in-depth learning about pollinator habitat and low-impact native plant gardening.

Revenue: Estimated less than \$200 first two years, or all volunteer based. Primary activity is volunteers expanding and growing garden.

Safety/Insurance: No impact to insurance.

1 and 5 – Nature Journaling (Combine with Mind/Body, Full Moon, water coloring in nature, meditation, small group discussion, Tai Chi, sound immersion)

Description: Small group, quiet, low impact uses

Facilities: Tranquility Hill

Dependencies: FBCS docent to monitor and ensure proper set-up and clean-up. First six months used to pilot programs and develop appropriate outreach to ensure activities stay low impact. Infrequent after-hour events will require special permits to be obtained in advance from the District (e.g. Full Moon or night astronomy).

Number of Participants: 10-15, 20 for low impact activities like yoga: Up to 1,000 participants for year 2.

Revenue: FBCS collects fees and retains \$10/person or ability to pay; potential net revenue/donations, \$6,688 year 1; \$6,688 year 2

Safety/Insurance: FBCS Docents provide safety; No impact to insurance.

2 – Ambassador Horses and Small Farm Animals (Enclosures subject to District approval)

Description: This cornerstone project serves a number of related programs. Establish a dedicated space that can accommodate two horses, four goats or four sheep, and six chickens. This area lays the groundwork for initiatives that foster animal interaction and learning experiences. The animals will offer unique opportunities for the public to both observe and engage with them. Visitors will connect with the horses and small animals in a welcoming environment. Additionally, there is potential to develop FBCS docent and volunteer-led activities, which can be incorporated into existing offerings such as guided tours and school group visits.

Overall, this project will enable a variety of new programs that give the community access to hands-on animal interactions and educational opportunities. These efforts will enrich our programming and enhance public engagement.

Facilities: Lower Area, temporary structures of two paddocks, goat house and chicken coop.

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Dependencies: All structures must be “temporary.” Requires reconnecting old water system in the lower area to the new water system. This project is partially funded with a \$5,000 grant from Bay Area Barns and Trails. Additional funding will come from donations.

Number of Participants: Estimated 200-300 per year

See other programs described below that rely on the Ambassador Program for participants

Revenue and Costs Estimates: See other programs described below that rely on the Ambassador Program for participant to be served. Revenue and costs are incorporated in those other programs.

Impact: Low-impact program using an area of Bear Creek Stables that has been used for both horses and small animals. It is all contained in the lower area that has been set-aside for program activities.

Safety/Insurance: This area is currently closed to the public. Initial programs using this area will be supervised. Other programs described below will provide safe access for the general public that want to view horses and animals from the distance. No impact to insurance.

3 and 4 – Summer Camp – Ages 7-18

Description: One- and two-week day camps for 4-5 hours per day, 5 days per week during the summer. Six sessions. Other sessions for therapy programs.

Facilities: Large (upper) arena, small arena, shaded area with picnic tables

Dependencies: certified trainers and adult volunteers. At a minimum: one adult for every three participants (under 10), one adult for every four participants (11-18), or as required for certified therapy programs. Two to four horses appropriate for the specific program age group and material to be taught. Ability to offer programs, including types and number of participants, depends on availability of upper and lower arenas and round pens.

Number of participants: 5 for children under 10 years of age. Children over 10 could be increased to 8 participants if horses are available. Age limits consistent with therapy programs.

Revenue: Full-price camp fees would be \$150 per day, or \$1,500 per student for 2-week camp; reduced fees/zero cost options as described under requirements offered for all programs. Costs would include obtaining safety equipment for participants, instructor fees, and facility maintenance.

Safety/Insurance: High. Above-stated ratio of adult-to-participant to meet safety standards. Outside trainers/providers required to have own insurance and execute waivers. No impact to insurance as participants must be at least 7 years old.

SEE ADDITIONAL INFORMATION BELOW REGARDING PROGRAMS THAT INCLUDE RIDING

3 – Adult Introduction to Horsemanship

Description: Progressive set of programs for adults interested in developing horsemanship skills. First programs would center on ground work, leadership, and communication skills. These could progress to riding programs. Mounted therapy programs for veterans or others with special needs.

Facilities: Upper arena and round pen.

Dependencies: Certified trainers and access to horses. Ability to offer programs, including types and number of participants, depends on availability of upper and lower arenas and round pens.

Number of participants: 3-5 depending on number of horses available. May be 1-on-1 for therapy programs.

Revenue: Fees would include full fare, subsidized and sponsored participants. Costs would include obtaining safety equipment for participants who cannot afford boots and helmets.

Safety/Insurance: Outside trainers/providers required to have own insurance and execute waivers.

SEE ADDITIONAL INFORMATION BELOW REGARDING PROGRAMS THAT INCLUDE RIDING

5 – Nature Photography Classes

Description: Sponsored photography groups, i.e. Saratoga Photography Club

Facilities: Whole Preserve

Dependencies: FBCS Docent led

Number of participants: 10 – 30 per activity

Revenue: Suggested donation \$10/person, \$100 per year

Safety/Insurance: FBCS Docent provides oversight; low risk; no impact to insurance

6 – FBCS Docent-led Tours of Stables

Description: Tours of Stables, previously not open to the public, led by FBCS Docents. Promoted via local media, social media, and BCS network of supporters and service providers

Facilities: Whole Preserve

Dependencies: FBCS Docent led

Number of participants: 10 - 30

Revenue: Suggested donation \$10/person, \$1,500- 2,000 per year

Safety/Insurance: FBCS Docent provides oversight; low risk; no impact to insurance

7 – Scout “Badge” Activities

Description: Provide event for groups of scouts to meet badge requirements related to outdoor activities, nature exploration, ecology, and/or equine skills

Facilities: BCS

Dependencies: Volunteer with knowledge/skills to cover specific badge requirements

Number of participants: 5-10 each

Revenue: Free; donation welcome

Safety/insurance: Volunteer and scout leaders provide safety oversight; no impact to insurance.

8 – Volunteer Work Days

Description: High schools require students to complete volunteer hours. Some companies encourage their employees to volunteer or complete projects as part of their corporate giving programs. These have been previously utilized by Friends.

Facilities: designated space for each project;

Dependencies: providing safe tools and projects that are permitted at the site; volunteer supervisor; corporate donations

Number of participants: 5-10 once or twice a year

Revenue and costs: No revenue (benefit to site); costs limited to materials and tools required, with some materials donated

Safety/insurance: Volunteer to oversee work; no impact to insurance.

9 – Youth Science Education Programs

Description: Small nature-based classes, (e.g. five-sense hike, fungi hike)

Facilities: Lower Area, Acorn Meadow

Dependencies: Work with outside provider (e.g. YSI)

Number of participants: 15-20 per class

Revenue: \$200 per class, 10 classes year 1; 20 classes year 2, \$2,000 - \$4,000/year

Safety/insurance: Sponsoring organization and a BCS volunteer provide oversight; no impact to insurance.

9 – School Field-Trip Program

Description: Weekday programs sponsored by school districts to provide various nature-based programs and educational opportunities to learn about horses and small animals located on-site.

Facilities: Ambassador site and adjacent trail system.

Dependencies: Working with local school programs and our Educational Advisory Board to define curriculum, establish safety protocols, and ensure insurance and liability requirements are in place.

Number of participants: 15-30 per program

Revenue: No fee or Donation Driven (\$500/visit)

Safety/insurance: Schools provide supervision and will execute waivers; no impact to insurance.

10 – Senior Visits

Description: This would be FBCS docent-led activities for one of more of the following: nature hike, birding, grooming a horse, learning about our small farm animals, having a lunch in our lower group meeting area.

Facilities: Ambassador site, trails, Group Area

Dependencies: Requires using social media and reaching out to Senior Centers and Adult Education Programs to schedule visits.

Number of participants: 10-15 per event

Revenue/Cost: \$10-\$20/person, in-kind FCBS docent donation

Safety/insurance: Low risk; no impact to insurance.

10 – Assisted Senior Outreach

Description: Sponsor small-group outings for seniors that need help with activities of daily living and need assistance for transportation, etc.

Facilities: Lower Area, Acorn Meadow

Dependencies: Work with outside provider

Number of participants: 15-20 per event

Revenue: No revenue first two years.

11 – Family Day

Description: This program allows one to three families to reserve our Group Meeting area for outdoor lunch and/or FBCS docent-guided hike and/or lecture.

Facilities: Ambassador site, Group Area and adjacent trail system

Dependencies: Only small groups can be accommodated. Access would be arranged through car-pool. Would require FBCS docent so activities such as interactions with horses and small animals are supervised.

Number of participants: Small groups of 10-20; year 1 – twice a month, year 2 – four per month; 240 to 480 visitors per year

Revenue: \$10 per person or ability to pay; reduced or no cost for underserved communities.

Safety/Insurance: FBCS Docent provides oversight; low risk; no impact to insurance.

11 – Grand Opening Celebration

Description: This would be a one-time event sometime in April of 2026 to celebrate the reopening of Bear Creek Stables to the public. It would be arranged by invitation and reservation only.

Facilities: Use of the Alma Parking Lot, lower trail system and Bear Creek Stables available for FBCS docent-led tours and sit-down lunch, speeches, and acoustic music. Given the importance of our donors to successful operations going forward, this event would include reaching out to our whole database of donors, local dignitaries, and members of District staff.

ATTACHMENT D

Dependencies: Need to coordinate closely with District to facilitate the use of the Alma parking area and synchronize with District procedures for sponsoring similar events. Requires a permit and a charge for staff presence to manage.

Number of participants: 75 - 125

Revenue: Donations accepted. Potential for raising \$3,000 – \$12,000 at event and strengthening our relationship with donors that have contributed large sums of money in the past, giving us a chance to showcase the facility and future plans.

Safety/Insurance: Low risk; may require advance notice to insurer.

11 – Annual Supporter Day

Description: Once a year outreach to key donors who would be invited to Bear Creek Stables either by car pool or walking down from the Alma parking lot. The event would be late spring before school is out to facilitate easier parking.

Facilities: Parking at both Alma parking lot and Bear Creek Stables. Would involve supervised visits to all of the Bear Creek Stables site, with multiple opportunities to interact with our program providers, horses, and small animals.

Dependencies: Providing catered food, scheduling with our program providers, set-up of chairs and tables, clean-up afterward. Requires obtaining permit from District.

Number of participants: 75 - 100

Revenue/Costs: Donations accepted. Contracted staffing to provide set-up, food, and cleanup.

SPECIAL INFORMATION REGARDING RIDING PROGRAMS
(categories 3 and 4 above)

Riding programs

For the first two years, the number of horses brought on site for a program will be limited to ten and no more than 72 horses will be housed on site at any time. Mounted equine programs, including lessons, camps, and therapy programs, prioritize safety for people and horses. Camps that include mounted activities will be limited to not more than 18 weeks in any year. Participants in any mounted activity must be age 7 or older and must wear a helmet, long pants, and closed-toe, hard-heel shoes (no tennis shoes) for such activities. Helmets must meet or exceed the SEI Certified ASTM Standard F1163 protective equestrian helmet. FBCS will specifically describe any equine activity that will involve children younger than 7 years old, and provide satisfactory evidence of insurance coverage for activities involving children in this age group that is acceptable to District and will be allowed only in District's sole discretion.

The seasonal nature of outdoor camps, including equine activities and mounted experiences, may require additional horses be brought onto the property for part of the year. All horses will be subject to the requirements for health and biosecurity and the owners/operators will be required to sign liability waivers.

Rates and charges for programs and boarding

Rates will be set commensurate with similar programs and services in the general area of Santa Clara/San Mateo/Santa Cruz Counties. Rates charged by public recreation departments and agencies, at equine facilities on both public and private land, and by private providers will be evaluated for applicability. FBCS will use these rates to ensure we provide similar rates for comparable services, with additional discounts for underserved groups, as discussed elsewhere in this plan. Rates will be negotiated with individual outside providers. Rates for horse keeping will reflect the current status of the facility and available infrastructure (e.g. uncovered arena and round pen, tack and private grain storage, proximity to trails).

Rates typically charged for private horse boarding are variable being based on location, services offered, facilities and trails that can be used, and general overhead. Boarding rates shown here are used as a guide to ensure revenue from all horse related activities help pay the actual costs needed to provide our horse-related programs. Estimates of that overhead is included in our estimated expenses that include maintenance, capital improvements, labor costs, feed, equipment, insurance, utilities, etc.

The initial rate sheet below will only be changed with the prior written consent of District during its annual update or due to unanticipated price increases resulting from increases in cost to provide services or for new programming elements. FBCS will submit requests for changes that are part of the annual process at least 60 days in advance. All requests for changes will be in writing and will not be implemented until written approval is received from District.

Initial rate will be at current rate of \$605/month. Rate below establishes maximum at the end of 2 years. Any increases will be made in accordance with Boarder Agreement and assumes improvement to upper arena and upper round pen and will be limited to actual increases in direct costs for staff and hay.

Standard Stall with walk-out Paddock (all existing facilities): \$850

Stall only (may be constructed for horses in frequent program use): \$625

FINANCIAL PROJECTIONS

FBCS will start operations under the initial 2-year period with an Operating Fund of \$250,000. Budgeting for each year of the two-year period shall include maintaining a minimum reserve in the Operating Fund of \$72,000 to cover possible losses. An initial Maintenance Fund will start with and maintain a \$5,000 balance. Each month, 5% of gross program revenue for the prior month shall be added to the Maintenance Fund.

All funding shall come from program revenue, grants, sponsorships, and donations. Detailed estimates for revenue and expenses in Year 1 and Year 2 are provided below.

Revenue & Expenses Summary

Year 1 Summary

Budget Summary													
Categories	Apr-26	May-26	Jun-26	Jul-26	Aug-26	Sep-26	Oct-26	Nov-26	Dec-26	Jan-27	Feb-27	Mar-27	Totals
Operation Expenses	\$32,901	\$14,508	\$16,984	\$19,478	\$17,427	\$17,771	\$15,278	\$18,210	\$15,921	\$20,816	\$18,989	\$22,609	\$230,891
Program/Facility Investments	\$5,000	\$10,000	\$6,000	\$6,000	\$5,000	\$14,000	\$35,000	\$5,000	\$10,000	\$12,000	\$20,000	\$25,000	\$153,000
Expenses Totals	\$37,901	\$24,508	\$22,984	\$25,478	\$22,427	\$31,771	\$50,278	\$23,210	\$25,921	\$32,816	\$38,989	\$47,609	\$383,891
Revenue Operations	\$8,011	\$8,187	\$20,828	\$20,881	\$22,598	\$11,916	\$12,053	\$13,063	\$13,279	\$14,209	\$16,564	\$20,416	\$183,103
Profit Operations	(\$29,890)	(\$16,321)	(\$2,156)	(\$4,597)	\$171	(\$19,856)	(\$38,225)	(\$10,147)	(\$12,642)	(\$18,607)	(\$22,425)	(\$27,193)	(\$200,788)
Donations	\$16,250	\$19,250	\$17,250	\$16,750	\$36,250	\$16,650	\$16,250	\$16,250	\$16,250	\$16,250	\$16,250	\$16,250	\$219,900
Net Profit	(\$13,640)	\$2,929	\$15,094	\$12,153	\$36,421	(\$3,206)	(\$21,975)	\$6,103	\$3,608	(\$2,357)	(\$6,175)	(\$10,943)	\$19,112
Start Balance Operating Fund	\$262,000	\$248,360	\$251,288	\$266,382	\$278,536	\$314,956	\$311,751	\$289,776	\$295,879	\$299,486	\$297,129	\$290,955	\$280,012
End Blance Operating fund	\$248,360	\$251,288	\$266,382	\$278,536	\$314,956	\$311,751	\$289,776	\$295,879	\$299,486	\$297,129	\$290,955	\$280,012	\$281,112
Operating Fund													
Maintenance Fund Totals Raised	\$5,401	\$6,219	\$8,302	\$10,390	\$12,650	\$13,841	\$15,047	\$16,353	\$17,681	\$19,102	\$20,758	\$22,800	\$22,800
Operating Fund	\$248,360	\$251,288	\$266,382	\$278,536	\$314,956	\$311,751	\$289,776	\$295,879	\$299,486	\$297,129	\$290,955	\$280,012	\$281,112

Revenue

Year 1 Revenue

Program Name	Notes/Assumptions	#Particip.	Charge Per Participan	Apr-26	May-26	Jun-26	Jul-26	Aug-26	Sep-26	Oct-26	Nov-26	Dec-26	Jan-27	Feb-27	Mar-27	Totals
Tranquility Hill (Low-Impact Activities like Nature Journaling, Yoga) -	Participants Year 1 - 120 , Year 2-240 70% - \$20, 20% - \$10. 10% - \$16	Variable	\$20	\$0	\$0	\$176	\$352	\$704	\$704	\$704	\$704	\$528	\$528	\$880	\$1,408	\$6,688
Birding Program	Participants Year 1 - 120 , Year 2-240 70% - \$20, 20% - \$10. 10% - \$16	Variable	\$20	\$0	\$0	\$33	\$33	\$38	\$0	\$38	\$38	\$0	\$38	\$38	\$30	\$283
Adult Introduction to Horsemanship (9 weeks)	Participants Year 1 - ?? , Year 2-?? 70% - Full Fee, 20% - half. 10% - free	25	\$750			\$5,000	\$5,000	\$5,000								\$15,000
Youth Horse Camp (9 weeks)	Participants Year 1 - ?? , Year 2-?? 70% - Full Fee, 20% - half. 10% - free	30	\$750			\$6,000	\$6,000	\$6,000								\$18,000
Nature Photography	Participants Year 1 - 60 , Year 2-120 70% - Full Fee, 20% - half 10% -	60	\$20	\$0	\$0	\$23	\$0	\$50	\$0	\$0	\$0	\$0	\$0	\$0	\$30	\$103
Docent Tours of Stables	Participants Year 1 - 400, Year 2-600 70% - Full Fee, 20% - half 10% - nine/tenths	Variable	\$10	\$0	\$176	\$176	\$176	\$176	\$176	\$176	\$176	\$0	\$88	\$176	\$352	\$1,848
Youth Science Education Programs	Participants Year 1 - 100, Year 2-200 70% - Full Fee, 20% - half 10% - nine/tenths	Variable	\$100	\$0	\$0	\$200	\$200	\$300	\$100	\$0	\$0	\$0	\$100	\$100	\$100	\$2,200
School Field Trips	Participants Year 1 - 80, Year 2-160 70% - Full Fee, 20% - half 10% -	Variable	\$10	\$100	\$100	\$100	\$0	\$0	\$0	\$200	\$0	\$0	\$100	\$200	\$300	\$1,100
Senior Programs	Participants Year 1 - 60, Year 2-120 70% - Full Fee, 20% - half 10% -	60	\$10	\$46	\$46	\$46	\$46	\$46	\$46	\$46	\$46	\$46	\$46	\$46	\$46	\$546
Assisted Senior Outreach	Participants Year 1 - 60, Year 2-160 Free, paid by Grant, Groups of 10, \$300/group	60	Free	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Boarding Revenue																
Number of Horses				13	13	15	15	17	18	18	20	21	22	25	30	
Boarding Fees. Subject to increase	Boarding Fees Year 1 May Increase	Variable	\$605	\$7,865	\$7,865	\$9,075	\$9,075	\$10,285	\$10,890	\$10,890	\$12,100	\$12,705	\$13,310	\$15,125	\$18,150	\$137,335
5% Gross Receipts	Does not Include Donations			\$401	\$409	\$1,033	\$1,026	\$1,095	\$561	\$567	\$618	\$638	\$684	\$784	\$950	\$8,766
Donations			Total													
Individual			\$65,000	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$65,000
Corporate			\$50,000	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$50,000
Grants			\$30,000	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$30,000
Foundations			\$50,000	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$50,000
Fund Raising Events				\$0	\$0	\$1,000	\$500	\$0	\$400	\$0	\$0	\$0	\$0	\$0	\$0	\$1,900
Grand Opening Celebration				\$0	\$3,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$3,000
Annual Suppoter Day	3000, 6000			\$0	\$0	\$0	\$0	\$20,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$20,000
Total Donation				\$16,250	\$19,250	\$17,250	\$16,750	\$36,250	\$16,650	\$16,250	\$16,250	\$16,250	\$16,250	\$16,250	\$16,250	\$219,900
Total Revenues																
Programs																\$45,768
Boarding																\$137,335
Donations																\$219,900
Total From All Sources																\$403,003

Year 1 Expenses

EXPENSES																	
<u>Payroll</u>	Department	Hourly Wage	Fully Loaded Wage	Annual Wage	Apr-26	May-26	Jun-26	Jul-26	Aug-26	Sep-26	Oct-26	Nov-26	Dec-26	Jan-27	Feb-27	Mar-27	Totals
Salaried Employees		Hourly Wage			\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Stable Hand - 80%	Equine	\$28	\$31	\$52,142	\$4,345	\$4,345	\$4,345	\$4,345	\$4,345	\$4,345	\$4,345	\$4,345	\$4,345	\$4,345	\$4,345	\$4,345	\$52,142
Part time Stable Manger - Initially 30% (Range \$30-\$45)	Equine	\$45	\$50	\$31,103	\$0	\$863	\$863	\$863	\$863	\$863	\$863	\$863	\$863	\$863	\$863	\$863	\$9,496
Part time Program Manager - Trainee or Experienced, 30% (\$18-\$45)	Programming	\$45	\$50	\$31,103	\$0	\$0	\$2,158	\$2,158	\$2,158	\$2,158	\$2,158	\$2,158	\$2,158	\$4,317	\$4,317	\$4,317	\$28,057
Volunteer Positions																	
CEO - Start Day 0	Administration	50.0%		\$100,000													\$0
Organizational Development - Start Day 0	Administration	15%		\$30,000													\$0
Book-Keeping Finances - Start Day 0	Administration	10.0%		\$8,500													\$0
Barn Mangement - Start Day 0	Equine	30.0%		\$28,080													\$0
Program Management - TBD	Programming	30.0%		\$28,080													\$0
Professional/Contractors		Seasonal Fee															
Adult Introduction to Horsemanship - Reference Program Revenue and pay 80% to Contract - Season will be truncated	Equine	\$12,360					\$824	\$824	\$824								\$824
Youth Horse Camp- Reference Program Revenue and pay 80% to Contractor - Season will be truncated	Equine	\$14,832					\$989	\$989	\$989								\$989
Science Programs - Split Fees 50% too Contractor, 50% to Friends	Programming	\$1,100															\$1,100
			Annual Rate	Mostly Average													
Operating																	
San Jose Water - Estimated \$350/month, \$14/horse-month				\$14	\$282	\$282	\$310	\$310	\$338	\$352	\$352	\$380	\$394	\$408	\$450	\$520	\$4,378
Electrical - Minimal \$50				\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$600
Bank Charges					\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$180
Merchant Services - Zero for now																	\$0
Supplies & Material (includes Start-up Costs)				\$35	\$5,000	\$35	\$35	\$35	\$35	\$35	\$35	\$35	\$35	\$35	\$35	\$35	\$5,385
Web Services - \$1,000/month					\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$12,000
Software Subscriptions - Quickbooks, Online Sign-up					\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$720
Travel Expenses - 0																	\$0
Training - CPR, Docent, Background Check - Onboarding Expenses					\$1,000	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$3,200
Tax Filing/Regulatory Fee -					\$1,000												\$1,000
Deferred Maintenance at 5% Gross Receipts minus donations					\$401	\$409	\$1,033	\$1,026	\$1,095	\$561	\$567	\$618	\$638	\$684	\$784	\$950	\$8,766
Equipment Est. Gate/Tractor			\$30,000		\$15,000	\$2,500	\$0	\$2,500	\$0	\$2,500	\$0	\$2,500	\$0	\$2,500	\$0	\$2,500	\$30,000
Unforeseen Expense Estimated			\$10,000		\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$10,000
Insurance																	
Equine Insurance - 1st Year - \$4,500/year			\$4,500		\$375	\$375	\$375	\$375	\$375	\$375	\$375	\$375	\$375	\$375	\$375	\$375	\$4,500

Year 1 Expenses

General Liability Insurance - \$3,500/year			\$3,500		\$292	\$292	\$292	\$292	\$292	\$292	\$292	\$292	\$292	\$292	\$292	\$292	\$3,500	
Workmen's Comp - Will Vary, \$700/month					\$700	\$700	\$700	\$700	\$700	\$700	\$700	\$700	\$700	\$700	\$700	\$700	\$8,400	
Auto/Tractor Insurance			\$3,000		\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$3,000	
Equine Supplies/Feed																		
Number of Horses					19	13	13	15	15	17	18	18	20	21	22	25	30	
Feed for Animals - 10 - 30 horse Est. \$133/horse-month					\$2,516	\$1,729	\$1,729	\$1,995	\$1,995	\$2,261	\$2,394	\$2,394	\$2,660	\$2,793	\$2,926	\$3,325	\$3,990	\$30,191
Manure Management - Est. \$25/horse-month					\$25	\$325	\$325	\$375	\$375	\$425	\$450	\$450	\$500	\$525	\$550	\$625	\$750	\$5,675
Vet/Farrier Exp Fees - Estimated \$18/horse-month					\$18	\$231	\$231	\$267	\$267	\$302	\$320	\$320	\$356	\$373	\$391	\$444	\$533	\$4,036
Short Term Supplies/Equipment																	\$0	
Long Term Equipment																	\$0	
Operation Expenses					\$32,901	\$14,508	\$16,984	\$19,478	\$17,427	\$17,771	\$15,278	\$18,210	\$15,921	\$20,816	\$18,989	\$22,609	\$230,891	
Program/Facility Investments					\$5,000	\$10,000	\$6,000	\$6,000	\$5,000	\$14,000	\$35,000	\$5,000	\$10,000	\$12,000	\$20,000	\$25,000	\$153,000	
Expenses Totals					\$37,901	\$24,508	\$22,984	\$25,478	\$22,427	\$31,771	\$50,278	\$23,210	\$25,921	\$32,816	\$38,989	\$47,609	\$383,891	

Revenue & Expenses Summary

Year 2 Budget Summary

Budget Summary													
Categories													
	Apr-27	May-27	Jun-27	Jul-27	Aug-27	Sep-27	Oct-27	Nov-27	Dec-27	Jan-28	Feb-28	Mar-28	Totals
Operation Expenses	\$45,509	\$26,253	\$26,987	\$29,481	\$26,989	\$26,253	\$23,759	\$26,249	\$23,739	\$26,255	\$23,764	\$26,279	\$331,518
Program/Facility Investments	\$5,000	\$10,000	\$16,000	\$21,000	\$5,000	\$14,000	\$35,000	\$5,000	\$10,000	\$12,000	\$20,000	\$25,000	\$178,000
Expenses Totals	\$50,509	\$36,253	\$42,987	\$50,481	\$31,989	\$40,253	\$58,759	\$31,249	\$33,739	\$38,255	\$43,764	\$51,279	\$509,518
Revenue Operations	\$22,646	\$22,822	\$38,253	\$38,306	\$38,813	\$23,526	\$23,663	\$23,463	\$23,074	\$23,399	\$23,939	\$24,766	\$327,768
Profit Operations	(\$27,863)	(\$13,431)	(\$4,735)	(\$12,175)	\$6,824	(\$16,727)	(\$35,096)	(\$7,786)	(\$10,665)	(\$14,856)	(\$19,825)	(\$26,514)	(\$181,751)
Donations	\$16,250	\$19,250	\$17,250	\$16,750	\$36,250	\$16,650	\$16,250	\$16,250	\$16,250	\$16,250	\$16,250	\$16,250	\$219,900
Net Profit	(\$11,613)	\$5,819	\$12,515	\$4,575	\$43,074	(\$77)	(\$18,846)	\$8,464	\$5,585	\$1,394	(\$3,575)	(\$10,264)	\$38,149
Start Balance Operating Fund	\$262,000	\$250,387	\$256,206	\$268,721	\$273,296	\$316,370	\$316,293	\$297,446	\$305,910	\$311,495	\$312,889	\$309,313	\$299,049
End Balance Operating fund	\$250,387	\$256,206	\$268,721	\$273,296	\$316,370	\$316,293	\$297,446	\$305,910	\$311,495	\$312,889	\$309,313	\$299,049	\$300,149
Operatin Fund													
Maintenance Fund Totals Raised	\$6,132	\$8,414	\$12,240	\$16,070	\$19,952	\$22,304	\$24,670	\$27,017	\$29,324	\$31,664	\$34,058	\$36,535	\$36,535
Operating Fund	\$250,387	\$256,206	\$268,721	\$273,296	\$316,370	\$316,293	\$297,446	\$305,910	\$311,495	\$312,889	\$309,313	\$299,049	\$300,149

Revenue

Year 2 Revenue

Program Name	Notes/Assumptions	#Particip	Charge Per Participan	Apr-27	May-27	Jun-27	Jul-27	Aug-27	Sep-27	Oct-27	Nov-27	Dec-27	Jan-28	Feb-28	Mar-28	Totals	
Tranquility Hill (Low-Impact Activities like Nature Journaling, Yoga) -	Participants Year 1 - 120 , Year 2-240 70% - \$20, 20% - \$10. 10% - \$16	Variable	\$20	\$0	\$0	\$176	\$352	\$704	\$704	\$704	\$704	\$528	\$528	\$880	\$1,408	\$6,688	
Birding Program	Participants Year 1 - 120 , Year 2-240 70% - \$20, 20% - \$10. 10% - \$16	Variable	\$20	\$0	\$0	\$33	\$33	\$38	\$0	\$38	\$38	\$0	\$38	\$38	\$30	\$283	
Adult Introduction to Horsemanship (9 weeks)	Participants Year 1 - ?? , Year 2-?? 70% - Full Fee, 20% - half. 10% - free	35	\$750			\$7,000	\$7,000	\$7,000								\$21,000	
Youth Horse Camp (9 weeks)	Participants Year 1 - ?? , Year 2-?? 70% - Full Fee, 20% - half. 10% - free	40	\$750			\$8,000	\$8,000	\$8,000								\$24,000	
Nature Photography	Participants Year 1 - 60 , Year 2-120 70% - Full Fee, 20% - half 10% - nine/tenths	60	\$20	\$0	\$0	\$23	\$0	\$50	\$0	\$0	\$0	\$0	\$0	\$0	\$30	\$103	
Docent Tours of Stables	Participants Year 1 - 400, Year 2-600 70% - Full Fee, 20% - half 10% - nine/tenths	Variable	\$10	\$0	\$176	\$176	\$176	\$176	\$176	\$176	\$176	\$176	\$0	\$88	\$176	\$352	\$1,848
Youth Science Education Programs	Participants Year 1 - 100, Year 2-200 70% - Full Fee, 20% - half 10% - nine/tenths	Variable	\$100	\$0	\$0	\$200	\$200	\$300	\$100	\$0	\$0	\$0	\$100	\$100	\$100	\$2,200	
School Field Trips	Participants Year 1 - 80, Year 2-160 70% - Full Fee, 20% - half 10% - nine/tenths	Variable	\$10	\$100	\$100	\$100	\$0	\$0	\$0	\$200	\$0	\$0	\$100	\$200	\$300	\$1,100	
Senior Programs	Participants Year 1 - 60, Year 2-120 70% - Full Fee, 20% - half 10% - nine/tenths	60	\$10	\$46	\$46	\$46	\$46	\$46	\$46	\$46	\$46	\$46	\$46	\$46	\$46	\$546	
Assisted Senior Outreach	Participants Year 1 - 60, Year 2-160 Free, paid by Grant, Groups of 10, \$300/group	60	Free	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Boarding Revenue																	
Number of Horses				30	30	30	30	30	30	30	30	30	30	30	30		
Boarding Fees. Subject to increase	Boarding Fees Year 1 May Increase	Variable	\$750	\$22,500	\$22,500	\$22,500	\$22,500	\$22,500	\$22,500	\$22,500	\$22,500	\$22,500	\$22,500	\$22,500	\$22,500	\$270,000	
5% Gross Receipts																	
Does not Include Donations																	
				\$1,132	\$1,141	\$1,904	\$1,898	\$1,905	\$1,141	\$1,148	\$1,138	\$1,127	\$1,144	\$1,153	\$1,168	\$15,999	
Donations																	
			Total														
Individual			\$65,000	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$65,000	
Corporate			\$50,000	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$50,000	
Grants			\$30,000	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$30,000	
Foundations			\$50,000	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$4,167	\$50,000	
Fund Raising Events				\$0	\$0	\$1,000	\$500	\$0	\$400	\$0	\$0	\$0	\$0	\$0	\$0	\$1,900	
Grand Opening Celebration				\$0	\$3,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$3,000	
Annual Suppoter Day	3000, 6000			\$0	\$0	\$0	\$0	\$20,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$20,000	
Total Donation				\$16,250	\$19,250	\$17,250	\$16,750	\$36,250	\$16,650	\$16,250	\$16,250	\$16,250	\$16,250	\$16,250	\$16,250	\$219,900	
Total Revenues																	
Programs																\$57,768	
Boarding																\$270,000	
Donations																\$219,900	
Total From All Sources																\$547,668	

Year 2 Expenses

EXPENSES	Department	Hourly Wage	Fully Loaded Wage	Annual Wage	Apr-27	May-27	Jun-27	Jul-27	Aug-27	Sep-27	Oct-27	Nov-27	Dec-27	Jan-28	Feb-28	Mar-28	Totals
Payroll																	
Salaried Employees																	
Stable Hand - 80%	Equine	\$28	\$31	\$52,142	\$4,345	\$4,345	\$4,345	\$4,345	\$4,345	\$4,345	\$4,345	\$4,345	\$4,345	\$4,345	\$4,345	\$4,345	\$52,142
Part time Stable Manger - Initially 30% (Range \$30-\$45)	Equine	\$45	\$50	\$31,103	\$4,317	\$4,317	\$4,317	\$4,317	\$4,317	\$4,317	\$4,317	\$4,317	\$4,317	\$4,317	\$4,317	\$4,317	\$51,798
Part time Program Manager - Trainee or Experienced, 30% (\$18-\$45)	Programming	\$45	\$50	\$31,103	\$4,317	\$4,317	\$4,317	\$4,317	\$4,317	\$4,317	\$4,317	\$4,317	\$4,317	\$4,317	\$4,317	\$4,317	\$51,798
Volunteer Positions																	
CEO - Start Day 0	Administration	50.0%		\$100,000													\$0
Organizational Development - Start Day 0	Administration	15%		\$30,000													\$0
Book-Keeping Finances - Start Day 0	Administration	10.0%		\$8,500													\$0
Barn Mangement - Start Day 0	Equine	30.0%		\$28,080													\$0
Program Management - TBD	Programming	30.0%		\$28,080													\$0
Professional/Contractors																	
Adult Introduction to Horsemanship - Reference Program Revenue and pay 80% to Contractor - <i>Season will be truncated</i>	Equine	Seasonal Fee	\$17,304				\$1,154	\$1,154	\$1,154								\$1,154
Youth Horse Camp- Reference Program Revenue and pay 80% to Contractor - <i>Season will be truncated</i>	Equine		\$19,776				\$1,318	\$1,318	\$1,318								\$1,318
Science Programs - Split Fees 50% too Contractor, 50% to Friends	Programming		\$1,100														\$1,100
			Annual Rate	Mostly Average													
Operating																	
San Jose Water - Estimated \$350/month, \$14/horse-month				\$14	\$520	\$520	\$520	\$520	\$520	\$520	\$520	\$520	\$520	\$520	\$520	\$520	\$6,240
Electrical - Minimal \$50				\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$600
Bank Charges					\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$15	\$180
Merchant Services - Zero for now																	\$0
Supplies & Material (includes Start-up Costs)				\$35	\$5,000	\$35	\$35	\$35	\$35	\$35	\$35	\$35	\$35	\$35	\$35	\$35	\$5,385
Web Services - \$1,000/month					\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$12,000
Software Subscriptions - Quickbooks, Online Sign-up					\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$720
Travel Expenses - 0																	\$0
Training - CPR, Docent, Background Check - Onboarding Expenses					\$1,000	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$3,200
Tax Filing/Regulatory Fee -					\$1,000												\$1,000
Deferred Maintenance at 5% Gross Receipts minus donations					\$1,132	\$1,141	\$1,904	\$1,898	\$1,905	\$1,141	\$1,148	\$1,138	\$1,127	\$1,144	\$1,153	\$1,168	\$15,999
Equipment Est. Gate/Tractor			\$30,000		\$15,000	\$2,500	\$0	\$2,500	\$0	\$2,500	\$0	\$2,500	\$0	\$2,500	\$0	\$2,500	\$30,000
Unforeseen Expense Estimated			\$10,000		\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$10,000
Insurance																	
Equine Insurance - 1st Year - \$4,500/year			\$4,500		\$375	\$375	\$375	\$375	\$375	\$375	\$375	\$375	\$375	\$375	\$375	\$375	\$4,500
General Liability Insurance - \$3,500/year			\$3,500		\$292	\$292	\$292	\$292	\$292	\$292	\$292	\$292	\$292	\$292	\$292	\$292	\$3,500

Year 2 Expenses

Workmen's Comp - Will Vary, \$700/month				\$700	\$700	\$700	\$700	\$700	\$700	\$700	\$700	\$700	\$700	\$700	\$700	\$700	\$8,400
Auto/Tractor Insurance			\$3,000	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$3,000
Equine Supplies/Feed																	
Number of Horses				30	30	30	30	30	30	30	30	30	30	30	30	30	
Feed for Animals - 10 - 30 horse Est. \$133/horse-month				\$3,990	\$3,990	\$3,990	\$3,990	\$3,990	\$3,990	\$3,990	\$3,990	\$3,990	\$3,990	\$3,990	\$3,990	\$3,990	\$47,880
Manure Management - Est. \$25/horse-month				\$25	\$750	\$750	\$750	\$750	\$750	\$750	\$750	\$750	\$750	\$750	\$750	\$750	\$9,000
Vet/Farrier Exp Fees - Estimated \$18/horse-month				\$18	\$533	\$533	\$533	\$533	\$533	\$533	\$533	\$533	\$533	\$533	\$533	\$533	\$6,400
Short Term Supplies/Equipment																	\$0
Long Term Equipment																	\$0
Operation Expenses				\$45,509	\$26,253	\$26,987	\$29,481	\$26,989	\$26,253	\$23,759	\$26,249	\$23,739	\$26,255	\$23,764	\$26,279	\$331,518	
Program/Facility Investments				\$5,000	\$10,000	\$16,000	\$21,000	\$5,000	\$14,000	\$35,000	\$5,000	\$10,000	\$12,000	\$20,000	\$25,000	\$178,000	
Expenses Totals				\$50,509	\$36,253	\$42,987	\$50,481	\$31,989	\$40,253	\$58,759	\$31,249	\$33,739	\$38,255	\$43,764	\$51,279	\$509,518	

SUMMARY OF PLAN, APPROACHES, AND CHALLENGES

The business model for Friends of Bear Creek Stables (a non-profit), working with the District (a government entity), is built on four key elements:

1. The most important element is providing equine- and nature-based programs for the general public that are free, subsidized, or provided at rates that are typically charged for similar programs in the Greater San Francisco Area. Special efforts are needed to deliver programs to underserved communities. Profits generated from program fees are reinvested into programs and facilities.
2. Individual donations, in-kind donations, sponsorships, grants, and fund-raising events will be the major sources of funding for providing programs, maintaining facilities, and developing the infrastructure to grow and expand the variety of programs and number of people served.
3. Most funds will come from foundations and other non-profit organizations whose missions align with FBCS and District. To grow and be successful will require developing relationships with these organizations by maintaining excellence in everything we do: good business skills, quality programs, excellent safety record, and the participants in our programs are delighted by their experience.
4. Alignment with the mission of our partner, the District.

Our primary challenges are:

1. Starting with a core group of dedicated volunteers whose backgrounds are described in the sections “Description of Organization” and “Management Team Composition.”
2. Working within the current limits of the facilities where the bulk of our activities will occur. Some near-term improvements are essential to begin safely offering programs (upper arena restoration, secure electric gate access, temporary lighting), with anticipated construction to improve other essential facilities needed for expanding programs (restoring utilities to allow temporary trailer until build-out of permanent caretaker housing, rebuilding of lower arena and round pen (oval), additional lighting).
3. Initial working Capital of \$250,000.
4. Initial monthly revenue from horse boarding of \$7,865, from thirteen horses at \$605 per month.
5. Estimated revenue from Donations for the first two years of \$250,000 or more.
6. Should the District undertake future construction at the Stables, program types and scheduling will have to be adjusted to accommodate the construction project.

The priority for these first two years is to grow slowly, introduce a small number of public programs, partner with a half dozen program providers, and give the current boarders an opportunity to participate in our public programs as condition to continue boarding their horse after two years.

Efforts to identify and implement grant-based programs for participants with special needs including Veterans will start in Year 1. Grant and set-up planning for these types of programs take more to implement. Year 2 is our target to get one or more of these programs up and running. Ensuring we have the right facilities and qualified staff in place will determine how quickly we can set-up these programs.

Given the importance of ongoing fund raising and attracting in-kind donations to pay the majority of the cost for our public programs, proper staffing and expanding of our fundraising efforts will be paramount to our success.

To continue as a safe and viable place to board horses it is essential that we provide a safe, clean, and well-run facilities for horses that meets or exceeds standards of care provided by the best run boarding stables in the San Francisco Bay area.

The Board of Directors of Friends of Bear Creek Stables looks forward to building the partnership with the Midpeninsula Regional Open Space District, our supporters, and the community to execute this Business Plan.

Draft Job Descriptions for Year 1 & 2 Hires

DRAFT POSITION DESCRIPTIONS FOR EQUINE FACILITY MANAGER AND PROGRAM DIRECTOR

Both positions may be combined into a single position if a single candidate can meet requirements for both. Specific number of hours will depend on projected need at the time of hiring.

Part-time position, 12 hours per week.

Requires Saturday and/or Sunday May 15-September 15

Position Title: Equine Facility Manager Typical Duties:

- Oversee care of 15-30 horses at Bear Creek Stables.
- Coordinate schedule and use of horses for programs with Program Director and post related information that might impact individual use of equine facilities.
- Comply with terms of contract between Friends of Bear Creek Stables and Midpeninsula Regional Open Space District as to keeping of horses, maintenance of equine facilities, and property use related to horses.
- Maintain a safe and organized barn environment, including secure medication storage and up-to-date stall cards with feed, veterinary, and emergency information.
- Schedule intake health screening/exams for new horses and twice-yearly veterinary clinics.
- Collect and maintain required paperwork for owners/riders, including health data for horse and boarding agreement, emergency information, liability waivers, etc.
- Identify and address any horse health issues; bring issues to immediate attention of owners; contact veterinarians as needed per boarding agreement; implement treatment plans other than those completed by individual owner.
- Bring facility safety and maintenance issues to the attention of designated FBCS board member quickly and monitor corrective actions or repairs; may make some repairs.
- Create staff schedules for daily feeding/cleaning. May be required to feed/clean one day per week and fill in during staff vacations or absences.
- Enforce safety rules and regulations, including use of arena and round pen facilities.
- Provide guidance and training for staff, as needed.
- Maintain forage feed inventory data and order forage feed as needed. [Owners may store and feed supplemental feed per their separate agreements.]
- In coordination with FBCS board contact, implement emergency, evacuation, and disaster plans; may require handling of horses in emergency conditions.

NOTE: Duties, responsibilities, and activities may change at any time with or without notice.

This job description is not designed to cover or contain a comprehensive list of activities, duties or responsibilities that are required of the employee for this position.

Requirements

- Physically fit enough to work in a physical work environment.
- Significant experience in handling and caring for horses and identifying facility issues that may affect horse or human safety.
- Valid driver's license and reliable transportation.
- Ability to manage feed inventory.

- Ability to identify health issues (e.g. possible colic, lameness, weight loss) and carry out basic horse care directives of veterinarians (e.g. checking vital signs, bandaging and wound care, and administering medications).
- Ability to work collaboratively with FBCS Board members, staff (including feeding/cleaning staff and Program Director), horse owners, veterinarians.

Accommodations

This is not a live-in position. Housing may become available in temporary “trailer” quarters and would be separately negotiated if/when available.

Salary

\$30-45/hour

Job Benefits

Benefits include 72 hours annually Personal Time Off (can be used for vacation or sick leave; vacation must be pre-scheduled to accommodate program needs). Workers compensation and unemployment paid by employer.

***Equal Opportunity Employment:** We are committed to core values of diversity, equity, and inclusion. We are an equal opportunity employer and all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability status, protected veteran status, or any other characteristic protected by law*

Part-time position, 12 hours per week.

Requires Saturday and/or Sunday May 15-September 15

Position Title: Program Director Typical Duties:

- Work with designated FBCS Board member to develop calendar of programs.
- Greet and provide orientation to program coordinators and volunteers, including fire safety, LNT (Leave No Trace) philosophy and requirements, limitations on area of program use.
- Coordinate schedule and use of horses and arenas for equine programs with Equine Facility Manager.
- Comply with terms of contract between Friends of Bear Creek Stables and Midpeninsula Regional Open Space District as to program offerings and activities.
- Maintain a safe and organized physical environment, including secure storage of any flammable or hazardous materials.
- Collect and maintain required paperwork for program activities, including emergency information, liability waivers, etc.
- Use on-line program registration system to input and manage program schedules; identify needs for each activity; generate reports
- Identify and bring facility safety and maintenance issues to the attention of designated FBCS board member quickly and monitor corrective actions or repairs.
- Provide guidance and training for staff and volunteers, as needed.
- In coordination with FBCS board contact, implement emergency and disaster plans.

NOTE: Duties, responsibilities, and activities may change at any time with or without notice. This job description is not designed to cover or contain a comprehensive list of activities, duties or responsibilities that are required of the employee for this position.

Requirements

- Experience planning and coordinating work and resolving conflicting demands.
- Physically fit enough to work in a physical work environment.
- Valid driver's license and reliable transportation.
- Ability to schedule programs and manage conflicting requests
- Ability to use on-line registration system
- Ability to work collaboratively with FBCS Board members, staff (including feeding/cleaning staff and Equine Facility Director), contracted program, volunteers, and visitors.

Accommodations

This is not a live-in position.

Salary

\$18-45/hour

Job Benefits

Benefits include 72 hours annually Personal Time Off (can be used for vacation or sick leave; vacation must be pre-scheduled to accommodate program needs). Workers' compensation and unemployment paid by employer.

Equal Opportunity Employment: *We are committed to core values of diversity, equity, and inclusion. We are an equal opportunity employer and all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability status, protected veteran status, or any other characteristic protected by law*