



OPEN SPACE ACQUISITION IMPLEMENTATION
WORK PROGRAM
FOR THE
CITY OF SANTA CLARITA
FISCAL YEAR 2011-2012

Approved by Financial Accountability and Audit Panel: 06-20-11

Open Space Acquisition Implementation Work Program
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Open Space Preservation District

EXECUTIVE SUMMARY

Background

Since the City of Santa Clarita's incorporation in 1987, the City has made a significant effort to preserve greenbelts and undeveloped land within and outside the City. This includes implementing the vision of the first and subsequent City Councils to buffer the Santa Clarita Valley with a greenbelt to help maintain the character and quality of life for residents. During the "The Big Picture" Community Strategic Planning process in 2004, several open space goals were reaffirmed. Additionally, in 2007 a number of community members spoke to the Council in support of preserving undeveloped land and asked the Council to, once again, pursue the creation of a mechanism to finance the acquisition and preservation of undeveloped land. In April 2007, the City Council adopted a resolution to initiate the formation of the City of Santa Clarita Open Space Preservation District.

Open Space Preservation District Formation

Property owners from the City voted to support the new Open Space Preservation District (the "District"), with 69 percent ballots in favor and 31 percent not in favor. The District needed a simple majority of assessment to pass, which was received. On July 17, 2007, the City Council adopted Resolution Number 07-60 forming the City of Santa Clarita Open Space Preservation District.

The City of Santa Clarita's Open Space Preservation District represents a significant step forward in the City's ongoing efforts to acquire, preserve, and protect open space.

District Purpose

The Open Space Preservation District will expand upon the City's existing Open Space, Park, and Parkland Program ("Program").

The City already has an extensive Program for the acquisition, preservation, improvement, servicing and maintenance of parks, parkland, and open space lands. The existing program is responsible for the implementation of various functions associated with parks maintenance, park planning, and development. It provides planning and administration for the acquisition and construction of parks, open space, trails, and grounds as well as the operations and maintenance supplies to maintain the parks, facilities, trails, and open space. In addition, this program works with the community on the master plans and designs of various park facilities, and oversees the implementation of these designs by managing the construction process. Many properties outside the City's boundaries benefit from the City's existing Program (it is estimated that 71.5 percent of the benefiting area is outside the City).

It is the City Council's intent to use the additional funding from the District to expand the existing Program to accelerate vacant land acquisition in and around the City. The City has

already been doing this to some extent in previous years, but this would allow more funds to be used for this purpose.

District Funds

The City's existing Parks Program budget was approximately \$6.8 million in Fiscal Year 2007-08. The Open Space Preservation District increased the funds by approximately \$1.5 million annually, and the City Council has committed these \$1.5 million funds from the Open Space Preservation District to acquire vacant lands in and around the City, as identified in this Annual Open Space Acquisition Implementation Work Program ("Work Program").

Parcel Payments into the District

In 2007, a single-family residence paid \$25, which is the designated "Assessment Rate." Condominiums, townhomes, and apartments paid \$18.75 for each unit, and mobile home parks paid \$12.50 per space. Non-residential developed property, such as commercial, industrial, and institutional land uses, paid \$75 per acre, and vacant parcels paid \$18.75 per acre up to 5 acres (not to exceed \$93.75).

The maximum Assessment Rate that can be charged will increase by \$1 each year. The actual Assessment Rate in any fiscal year must be approved by the City Council prior to the levy and may not exceed the maximum Assessment Rate without receiving property owner approval for the increase.

Per Resolution 11-46 the single-family residence assessment rate for Fiscal Year 2011/12 is \$29 per Benefit Unit.

Assessment District Duration:

The assessment will be in place for thirty (30) years through Fiscal Year 2036-37.

Engineer's Report and Annual Work Program:

An Engineer's Report for the formation of this District was developed. The Engineer's Report is a legally required document, pursuant to Article XIID of the California Constitution, for assessment districts.

This document (Work Program) outlines how the open space acquisition will be accomplished, what the priorities are, etc. This Work Program provides acquisition principles, such as:

- The acquired land is within the benefit area for the District (within a 3-mile radius of the City's existing parks and open space lands), and
- At least 90 percent of the acres purchased will be preserved for natural open space (so that no more than 10 percent of the acres purchased will be used for future improved active parkland).

WORK PROGRAM

A. PRESENT CHALLENGES

The City of Santa Clarita incorporated in 1987 and recently celebrated its twenty (20) year anniversary. The City encompasses the communities of Canyon Country, Newhall, Saugus, and Valencia. Surrounding the City are various unincorporated areas and the Angeles National Forest. As of 2007, the City had approximately 240 acres of developed parkland, 33 miles of trails, and over 2,400 acres of City-owned open space. The City's General Plan requires five (5) acres of active parkland per 1,000 in population. Based on this requirement, the City faced a deficit of over 600 acres of active parkland in 2007.

As of June 2011, the City now has approximately 295 acres of developed parkland, 53 miles of trails, over 6,100 acres of City-owned open space, and a deficit of over 580 acres of active parkland base on the General Plan requirements. The City continues to seek a greenbelt/buffer of preserved open space around the valley and the City.

Santa Clarita is a vibrant community. Since incorporation, the City has experienced significant growth in area and population that has impacted the relationship between open space areas and developed land. The City desires to ensure that our open space areas are protected and maintained, it recognizes that growth must be complemented with continued protection of our open spaces and the addition of parks and recreation opportunities if the area's quality of life is to be maintained.

The City should build upon its strong history of park stewardship, development, trail construction, and open space preservation. If the City wishes to pass on to future generations of residents a community that retains the attractions that drew them here, the City must continue to protect and enhance its open space and parkland.

B. TYPES OF UNDEVELOPED LAND TO BE ACQUIRED

The following category descriptions explain the variety of open space preservation actions that are needed in the City:

- *Undeveloped Land Preservation* – This effort will seek to preserve and protect the undeveloped areas around the valley and further the City's goal to create a greenbelt/buffer around the valley and reduce sprawl.
- *Santa Clara River Watershed* – To bring the last unchanneled river in Southern California into public ownership and protect its wild, valuable habitat has long been a City goal.

- *Trails* – Santa Clarita is well known for its miles of scenic and effective bike and multi-use trails which link neighborhoods to parks and open space, yet many more critical linkages remain to be added and completed.
- *Wildlife Corridors* – Protection and enhancement of the core habitat of unique, endemic, and valuable plants and animals is a critical goal.

C. ACQUISITION PRINCIPLES

The following principles are the basis for allocation categories and the criteria within each allocated category. They will also guide the implementation of this Work Program and serve as benchmarks for the Financial Accountability and Audit Panel in reviewing project expenditures.

The following principles are intended to maximize the special benefit derived from this Work Program, maintain the integrity of the Work Program, and to assure fair and equitable distribution of acreage. A land acquisition project does not need to address each of these principles to be acquired, but the consistency with principles will be considered when allocations are determined.

- 1) To acquire parcels of undeveloped land
- 2) To provide local matching funds as a way to attract state, federal, and foundation funds
- 3) To provide new methods for undeveloped land preservation, including the appropriate use of conservation easements, trails, and protection of rivers and creeks
- 4) To distribute the open space acquisition equitably in and around the City and/or the Area of Benefit
- 5) To assure that new and existing undeveloped lands receive the necessary stewardship
- 6) To ensure that land that is acquired is within the benefit area as defined by the Open Space Preservation District Engineer's Report
- 7) To acquire ecologically significant parcels of undeveloped land and engage in regional cooperative efforts
- 8) To acquire parcels of undeveloped land of regional importance

In addition, there are several principles that assure that the Open Space Preservation District funds will be expended in a way that complement good public policy. These will also be used by the Financial Accountability and Audit Panel to gauge the appropriateness of expenditures.

- 9) To minimize impacts and respect adjacent property owners and the values they place on their property
- 10) To rely on existing institutions to implement this Work Program, to the extent possible, so that funds are spent efficiently
- 11) To endeavor to acquire property and easements from willing sellers
- 12) To acquire parcels in a fiscally responsible manner

D. ACREAGE ALLOCATION RATIO

Funds derived from the Open Space Preservation District that are utilized for this Work Program shall fund the acquisition of acres of undeveloped land in the following ratio:

- At least 90 percent of the acres purchased will be preserved natural open space, and
- No more than 10 percent of the acres purchased will be used for future improved active parkland

E. DESCRIPTION OF LAND ACQUISITION PROJECTS

The City of Santa Clarita's 2002 Open Space Acquisition Plan, the Nature Conservancy's 2006 Santa Clara River Upper Watershed Conservation Plan, Santa Clarita River Watershed Plan, LA County SEA, South Coast Wildlands Missing Linkages, Rim-of-the-Valley studies and other relevant technical documents will be considered to prioritize properties for land acquisition.

The City of Santa Clarita's Open Space Acquisition Plan, adopted by the City Council in August 2002, established a set of guidelines and policies for bringing open space in the Santa Clarita Valley into public ownership. The primary objective defined in the Open Space Acquisition Plan is creating a greenbelt of open space around the City. The purpose of the greenbelt is to ensure the character and natural habitat of the pristine environment surrounding the City. In addition, the Open Space Acquisition Plan also identifies finding open space within the City as a priority, not only as natural land, but as active park space as well.

During the community process that helped form the Open Space Acquisition Plan, staff was able to identify what members of the public consider open space to be. Open space was defined as vacant, undeveloped land in its natural state as well as both active and passive park space. It should be noted that in order for park space to be considered open space, the park needed to be of regional size. A small neighborhood "tot lot," for example, would not be considered open space. However, the City's Central Park, Newhall Park, or Canyon Country Park (to name only a few) were considered to be open space.

The Open Space Acquisition Plan's primary function as a planning tool is to identify sites that represent the best value for the City for acquisition. This is done by a set of established and approved criteria that can be applied to any potential property. At the same time, the Open Space Acquisition Plan can be used to determine if a potential property does not represent a good value to the City. Under either circumstance, when land is acquired, the City endeavors to respect the land use for which the current terrain, topography, and environmental characteristics best represents. To establish a regional scope, the Open Space Acquisition Plan identifies five key areas in the Santa Clarita Valley that are consistent with the City Council's direction for potential open space acquisition. These regions are:

- Eastern Region:
 - Approximate Area: From the 14 Freeway east to the Angeles National Forest and from the intersection of the 5/14 Freeways north to Vasquez Rocks.
 - Goals: To create a continuous strip of open space along the eastern border of the City of Santa Clarita. Connect open space between the City's boundary and the Angeles National Forest whenever possible.
 - Status: The City has made considerable progress in the eastern region. Currently, open space property is in public ownership near the proposed Transit Mixed Concrete (Cemex) project, Whitney Canyon, and several hundred acres associated with the Golden Valley Ranch development. In addition, Elsmere Canyon will likely be publicly held by the Mountains Recreation and Conservation Authority (MRCA). The region also includes Placerita Canyon and the Placerita Canyon Nature Center.

- Southern Region:
 - Approximate Area: From the intersection of the 5/14 Freeways north to the City of Santa Clarita boundary and between the identified eastern and western regions.
 - Goals: Link natural habitat and habitat migration corridors between the eastern and western regions.
 - Status: Over 200 acres of open space will be dedicated to the City associated with the Gate-King project. This region also contains the historic Beale's Cut property.

- Western Region:
 - Approximate Area: From the 5 Freeway to the Santa Susanna Mountains Significant Ecological Area, areas around Stevenson Ranch, and from the intersection of the 5/14 Freeways north along San Francisquito Creek.
 - Goals: To create a continuous strip of open space along the western border of the City of Santa Clarita.

- Status: Several significant properties exist in the region including the Santa Clarita Woodlands, Towsley Canyon, Mentryville, and 6,000 acres associated with the Newhall Ranch Development.

- Northern Region:
 - Approximate Area: From the northern boundary of the City of Santa Clarita north to the Angeles National Forest and from the 5 Freeway/Highway 126 interchange to Vasquez Rocks.
 - Goals: To create a continuous strip of open space along the northern border of the City of Santa Clarita. Connect open space between the City of Santa Clarita and the Angeles National Forest whenever possible.
 - Status: Future development of this region should be monitored and open space dedication pursued whenever possible.

- City of Santa Clarita:
 - Area: All areas contained within the defined boundaries of the City of Santa Clarita.
 - Goals: Work with all City departments, partners, and in conjunction with the Open Space Plan; the Parks, Recreation, and Open Space Master Plan; River Features Study; and other documents to acquire and protect open space, both active and passive, within the City limits. Work in partnership with the development community to secure open space through dedication.
 - Status: To date, the City has acquired 2,426 acres of open space and another 170 acres of passive or special use parkland, and has developed 240 acres of parkland.

The regions described above cover a significant area in the Santa Clarita Valley. As a result, a considerable acreage of land must be considered and analyzed prior to deciding upon a set of properties to pursue. The Open Space Acquisition Plan, along with this Work Program, can be used as a tool to assist the City Council and planners in determining which property or properties represent the best value for the City. The land acquisition projects to be considered for funding from the Open Space Preservation District will be located within the benefit area as identified in the Engineers Report.

F. ACQUISITION WORK PLAN

Procedures to Accomplish and Implement Goals

The goals and objectives of the Open Space Acquisition Plan will be met by an objective work plan. This work plan will enable the City of Santa Clarita to evaluate and rank

potential open space in the Santa Clarita Valley and maximize the limited funding and resources available for land acquisition and the Open Space Preservation District funds.

Potential Open Space

It is important to note that existing undeveloped land is not considered open space. For purposes of this plan, property will only be considered preserved open space if it is:

- In public ownership and/or;
- Appropriately zoned, designated, or identified as open space or parkland.

Properties being considered for acquisition will be considered “potential” open space until such a time that they come into public ownership and/or receive the appropriate designation or zoning.

Ranking Process

The City of Santa Clarita lacks the financial means to purchase all of the potential open space in the Santa Clarita Valley. As a result, the identification and acquisition of the most valuable pieces of potential open space becomes critically important to maximize the allocation of the City’s limited resources.

To achieve this end, an objective method of evaluation must be established to evaluate and rank each potential open space property being considered for acquisition. Ideally, those properties that present the greatest value to the City and/or Region should be acquired.

The following seven-step process will allow the City of Santa Clarita to determine which potential open space properties represent the greatest value for acquisition. This process will be applied to each parcel being considered for acquisition.

- Step One – Category of Land

Determine the category of the potential open space. There are two possible categories:

1. Inside the City of Santa Clarita
2. Outside the City of Santa Clarita and within the Open Space Preservation District’s Area of Benefit

Potential open space outside the City of Santa Clarita and within the Area of Benefit should receive priority for acquisition because:

- Preserving land outside the City will assist in the development of a greenbelt and ecological value surrounding the Santa Clarita Valley
- More development is occurring in Los Angeles County than in the City
- Land outside the City can create corridors between the City and the Angeles National Forest
- There is more potential open space to acquire outside the City

- Step Two – Development Status

Determine the development status of the potential open space. The seven status categories are:

- A. Entitlements Pending: Development plans have been formally submitted to the City or Los Angeles County and are in the process of being considered, or plans are being prepared for submittal.
- B. Information Inquiries: The property owner has approached the City or Los Angeles County regarding the property with the intent to develop.
- C. Entitlements Approved: Plans to develop the property have been approved by the City or Los Angeles County, and an opportunity exists to acquire open space from the property owner.
- D. Amendments – when changes or amendments to the property are proposed.
- E. Boundaries – The property’s boundary status has changed because of annexation, etc. The property is now within the Area of Benefit.
- F. No Action: No action has been taken to develop the property on the part of the property owner, OR the owner has indicated no interest in developing the property.
- G. No Information: There is currently no information and/or the development status of the property is unknown.

Status categories are shown in order of priority, with Status A being the highest.

- Step Three – Availability Status

Determine if the owner of the potential open space property is a willing seller or would enter into agreements to have the land acquired by the City.

Priority should be given to properties with a willing seller/donor unless the acquisition of the property presents an overriding benefit to the public good. An overriding benefit to the public good would be determined by City Council.

- Step Four – Create Subcategories

The potential open space property will now fit into one of several subcategories depending on whether it is inside or outside of the City, inside the Area of Benefit, and depending on its development status. Hence, each potential open space property will fall within one of the following categories:

Inside the City	Outside the City and within the Area of Benefit
Development Status A	Development Status A
Development Status B	Development Status B
Development Status C	Development Status C
Development Status D	Development Status D

Inside the City	Outside the City and within the Area of Benefit
Development Status E	Development Status E
Development Status F	Development Status F
Development Status G	Development Status G

Each category will have several potential open space properties within it forming a catalog of properties in each category. However, each potential open space property will not receive a relative ranking until Step 5 below.

At this time, the properties in each list should be sorted by their availability status. Those properties with willing sellers/donors should be placed at the top of the list, and those without at the bottom.

- Step Five – Apply Criteria

This step will apply the Open Space Inventory Checklist (OSIC) to each property on each list. (This step will also be the most time consuming.)

The OSIC identifies resources that the City of Santa Clarita believes to be valuable. These resources are divided into five categories: Habitat Areas; Ridgelines and Viewsheds; Recreational Resources; Cultural and Historical Resources; and Other Resources. Each category contains several elements and sub-elements. Each element and sub-element represents a specific benefit that is either present or not present at each individual property. Each element and sub-element is weighted equally.

The purpose of the OSIC is to assign numerical scores to each parcel of potential open space surveyed, based on their overall benefit to the City. Over time, as more parcels are considered, it will be possible to determine which parcels are more desirable and which are less desirable based on their relative scores.

To determine the numerical score for each property, the following steps should be followed:

1. Beginning with the Habitat Area Category, place a check in the “status” column of the OSIC for each element and/or sub-element that is present on the property.
2. Do not place a check in the “status” column in the OSIC of elements or sub-elements that do not exist on the property.
3. Apply Steps 1 and 2 to each of the remaining categories.
4. Count the number of check marks in each category and write that number in the corresponding “Category Subtotal” space.
5. Transfer the numbers from each “Category Subtotal” space to the front page of the OSIC in the spaces provided.
6. Add each of the category subtotals together and place the result on the front page of the OSIC in the space marked “Total Score.” This figure is the final numerical score of the property and will be used to establish its rank with other potential open space properties.

A copy of the Open Space Inventory Checklist and corresponding definitions is attached as Appendix A.

- Step Six – Catalog Generation

After each potential open space property has a numerical value assigned to it, each property should be listed within each category in numerical order, with the highest value at the top of each list. As indicated in Step 3, properties that do not have a willing seller/donor should be listed at the bottom of each list. The only exception to this is any property that has been identified as one whose acquisition would present significant benefit to the public good, as defined by the City Council. These properties should be listed among the properties with willing sellers/donors.

In addition, a general assessment of maintenance costs and liability of each property should be weighed at this time. All else being equal, those properties that present fewer maintenance challenges and reduced liability should be considered before those with more challenges and greater risk. Indeed, those properties that present unreasonable maintenance costs or significant risk may not be considered, regardless of their numerical score.

- Step Seven – Recommend Parcels for Acquisition

When each property has been ranked, a final catalog of the highest priority properties can be compiled by staff. A variety of methods can be used to create the final list of recommendations. This catalog will grow as more properties are considered.

Plan Flexibility

It is important to realize that this plan is only a guide. The ultimate decision on the acquisition of property belongs to the City Council. The evolving catalog of properties to acquire will not obligate the City but will serve as a tool in the decision-making process.

The plan must be flexible enough to allow for amendments. Because development occurs rapidly and the status of land changes in a similar fashion, the plan, or parts of the plan, should be updated as needed.

An explanation of steps one through seven is explained further in Section G: Open Space Evaluation Process, Step-by-Step.

Applications

This plan can be used for a variety of applications. However, there are three major areas of implementation:

1. Dedication: Often the City of Santa Clarita is approached by developers and/or property owners who wish to dedicate all or a portion of their property to the City as open space.

Although additional, natural land is needed in Santa Clarita and may present numerous opportunities, in some cases costs or liability associated with property ownership may not warrant acquisition.

In cases where the City is approached by a property owner with the intention to dedicate property, either the City can evaluate the property using the OSIC or it may be the case that the City has already evaluated the property independently. In either case, the property will receive or already have a numerical score.

In both cases, the proposed parcel will receive a score and be ranked against other potential open space in the Santa Clarita Valley. Depending on its score and rank, the City will be able to make an objective decision on whether to accept or deny the dedication.

2. **Development Review Committee:** Developers often propose to dedicate open space as part of the development process. The OSIC can be used by staff during the development review process to help determine whether the proposed open space meets the City's needs.

Depending on the rank given to the property using the OSIC, City staff will be able to make an objective decision about how the dedication will fit into the overall development process.

3. **Grant Writing:** There is a significant amount of grant funds available for acquisition of open space. Being able to provide an objective statement of value for any given property being sought for acquisition will help build valid justification for bringing the site into public ownership and enhance the City's ability to receive funding.

City staff applies for grants as they become available and as they meet the objectives of the City. Staff resources will be utilized to apply for available grant funds for acquisition of open space.

Over time, a substantial catalog of potential open space properties will be compiled.

G. OPEN SPACE EVALUATION PROCESS

Step-by-Step Instructions

The City's Open Space Acquisition Plan outlines the evaluation process for open space in the Santa Clarita Valley. The work plan is a series of seven steps designed to categorize and objectively determine the overall value of potential open space properties. This section includes detailed instructions for each step in the process.

1. **Land Category** – Determine whether the property is inside or outside of the Open Space Preservation District's Area of Benefit

2. Development Status – Determine the development status of the property
3. Availability Status – Determine if the property owner is a willing seller or donor
4. Create Subcategories – Categorize the property according Steps 1-3
5. Apply Criteria – Apply criteria on the Open Space Inventory Checklist (OSIC) to the property
6. Create Final Lists – Based on the property’s OSIC score, determine its relative rank within the property’s sub-list from Step 4.
7. Catalog Generation – Based on the final lists in Step 6, make recommendations on whether the property should or should not be considered for acquisition. Note that recommendations should always be directed to the City Council for approval.

Step 1 – Land Category

Step 1 requires the evaluator to determine whether the property is inside or outside of the Area of Benefit. This can be done by consulting the Open Space Preservation District map.

After Step 1 is completed, the potential property will be categorized as either “Inside the City” or “Outside the City and Within the Area of Benefit.” Properties categorized as “Outside the City and Within the Area of Benefit” have been identified by the City Council as higher priority than those categorized as “Inside the City and Within the Area of Benefit.”

Step 2 – Development Status

Step 2 in the process is to obtain the development status of the property from the Planning Division. Provide Planning with one of the following pieces of information (listed in priority order):

1. Address
2. Location (i.e., cross streets, etc.)
3. Tentative Parcel Map or Tentative Tract Map
4. Assessors Parcel Number (APN)

Based on the results of the Development Status search, the evaluator should assign the development history to one of the following categories:

- A. Entitlements Pending: Development plans have been formally submitted to the City or Los Angeles County and are in the process of being considered, or plans are being prepared for submittal.
- B. Information Inquiries: The property owner has approached the City or Los Angeles County regarding the property with the intent to develop.

- C. Entitlements Approved: Plans to develop the property have been approved by the City or Los Angeles County, and an opportunity exists to acquire open space from the property owner.
- D. Amendments – when changes or amendments to the property are proposed.
- E. Boundaries – The property’s boundary status has changed because of annexation, etc. The property is now within the Area of Benefit.
- F. No Action: No action has been taken to develop the property on the part of the property owner, OR the owner has indicated no interest in developing the property.
- G. No Information: There is currently no information and/or the development status of the property is unknown.

Development status categories are shown in priority order, with “Status A” being the highest priority.

By the end of Step 2, the property should be categorized as either “Inside the City” or “Outside the City and Within the Area of Benefit” and assigned a Development Status. (To this point, a property that is “Outside the City and Within the Area of Benefit” and has Development Status “A” would receive the highest priority. This will be discussed in Step 4 – Creating Subcategories.)

Step 3 – Availability Status

In this step, determine if the property owner is known to be a willing seller/donor or a non-willing seller/donor. If this is not known, it may be necessary to contact the property owner. (Contact information should be included in the information provided by Planning in Step 2.)

Priority should be given to properties with a willing seller/donor unless the acquisition of the property presents an overriding benefit to the public good, as determined by the City Council.

At the end of Step 3, the property should be categorized as “Inside the City” or “Outside the City and Within the Area of Benefit,” have a development status assigned to it (A through G), and whether the property owner is a willing seller/donor.

Step 4 – Create Subcategories

By this time, the potential open space property should have been categorized as indicated above in Step 3. The first relative value judgment of that property can now be assessed and compared with other open space properties that have been evaluated.

Properties that are “Outside the City and Within the Area of Benefit” and have a development status of “A” are identified as the highest priority for acquisition. Conversely, properties that are “Inside the City” with a development status of D or E are identified as the lowest priority for acquisition.

It should be noted that properties that are “Outside the City and Within the Area of Benefit” with a development status of “D” or “E” may or may not be a higher acquisition priority

than, for example, a property that is “Inside the City” and a development status of “A”. These instances should be considered on a case-by-case basis.

After Step 4, the property being evaluated should be placed in one of the following categories.

Inside the City	Outside the City and within the Area of Benefit
Development Status A	Development Status A
Development Status B	Development Status B
Development Status C	Development Status C
Development Status D	Development Status D
Development Status E	Development Status E
Development Status F	Development Status F
Development Status G	Development Status G

Step 5 – Apply Criteria

Step 5 of the evaluation is by far the most lengthy and the most involved segment of the process.

For each property the evaluator should complete an Open Space Inventory Checklist (OSIC) form. In most cases, it will be necessary to travel to the site itself to complete the form. Accessing each property will generally require the permission of the property owner.

Steps to Complete the OSIC:

1. Provide basic property information including:
 - The Assessor’s Parcel Number (APN)
 - The date(s) the evaluation was conducted
 - The initials of the evaluator
 - The availability status (willing seller/donor?)
 - A brief description of the location of the property

2. Provide basic category and development status information. Circle whether the property is inside or outside the City, and inside or outside the Area of Benefit, and circle the letter that corresponds to the property’s appropriate development status.

3. Evaluate each element and sub-element of each of the six inventory categories. These six categories are:
 - Habitat Areas
 - Ridgelines and Viewsheds
 - Recreational Resources
 - Cultural/Historical Resources
 - Other Resources
 - Hazard/Other Areas

To evaluate the elements and sub-elements in each inventory category, place an “X” or checkmark in the status column of each element or sub-element known to exist or observed to exist on the property. Place no marks in the status column for elements or sub-elements not known or observed to exist on the property.

For Example: If a hypothetical property being evaluated contains a wildlife migration corridor, riparian habitat, a portion of the Santa Clara River, and a known presence of the Southwestern Willow Flycatcher (to name a few), then these elements and sub-elements should each receive an “X” or checkmark in the corresponding status column. Other elements and sub-elements that are not known to be or observed to be present on the site should NOT receive a mark.

Special Instructions:

Some elements and sub-elements have special scoring instructions associated with them. In most cases, only one mark should be placed in the corresponding status column of known or observed elements and sub-elements. However, there are exceptions. These are:

- Known threatened/endangered plant and animal species: The species listed on the OSIC are those that appeared on the 2008 list provided by the California Department of Fish and Game. These elements and sub-elements should always reflect the most current list of state and federally endangered and threatened species. Place only one mark in the status column for each sub-element present regardless of the population of the species. Do not, for example, place one mark in the status column for each individual of that species present on the property.
 - Ridgelines: Place a mark in the status column if there is at least one ridgeline present on the property.
 - Cultural and/or Historical Resource Areas: Place one mark in each sub-element for each site on the property. For example, a hypothetical property containing two Native American sites and two “other” archaeological sites should receive a total of four marks in the corresponding status column.
4. Score each inventory category. To complete this step, simply count all of the X’s or checkmarks for elements and sub-elements within each inventory category. Record the total number of marks for each category in the space provided in the category column. In addition, record the same figures in the spaces provided in the score summary box at the top left of the first page of the OSIC.

Note that marks in the Hazard/Other Area category are not included in the overall total. Instead, these marks are meant to be general indicators of potentially negative aspects of the property. The City may wish to reconsider acquisition of properties that contain any of the sub-elements in this category, regardless of the extent or frequency.

For Example: A hypothetical property has one primary ridgeline, the presence of secondary ridgelines, a significant “dark sky” viewshed, a significant regional viewshed, and a unique on-site visual feature yielding a total of five marks in the Ridgeline and Viewshed Category. The number “5” would be recorded in the category column and on the front page in the space provided next to “Ridgelines and Viewsheds.” The same process would be completed for each of the six inventory categories.

5. Add the inventory category scores to compute the property’s overall score. When each category score has been recorded in the spaces provided on the front page of the OSIC, the scores should be totaled (except those in the Hazards category). This is the final score of the property being evaluated.

By the end of Step 5, the property being evaluated should have a total score associated with it. The higher the score, the greater the relative value of the property to the City.

Step 6 – Catalog Generation

At this point, the property being evaluated should have the following assigned to it:

- A land category either “Inside the City” or “Outside the City and Within the Area of Benefit”
- A development status of either A through G
- A total score based on criteria in the OSIC

As the catalog of open space grows, properties should be sorted according to their land category and development status. Properties of the same land category and development status should then be sorted by the score received, based on the criteria in the OSIC. A higher OSIC score represents a property of greater value. Hence, a property that is “Outside the City and Within the Area of Benefit,” development status “A,” and with the highest OSIC score should theoretically represent the greatest overall value to the City for acquisition.

Note: Those properties with non-willing sellers/donors should be grouped at the bottom of subcategories, in OSIC score order.

Step 7 – Recommend Parcels for Acquisition

Based on the final set of lists, parcels that represent the greatest value for the City to acquire should be recommended. All recommendations should be directed to the City Council for final approval.