



R-24-142
Meeting 24-30
November 20, 2024

AGENDA ITEM 4

AGENDA ITEM

Selection of a Long-term Use and Management Option for the Bear Creek Stables Site

GENERAL MANAGER'S RECOMMENDATIONS

1. Select one of the following long-term use and management options for the Bear Creek Stables (Stables) Site, each of which are discussed in detail within this report:
 - a. Continue stables boarding and programming consistent with the Ad Hoc Committee Option by implementing a phased approach to the site improvements, programming, and fundraising; option includes a non-profit entity to manage, operate, and fundraise for the stables; option involves the District funding and completing certain annual maintenance and repairs (to be negotiated) and all capital improvements and site cleanups for Phases 0 and 1; since Phase 2 is dependent on future non-profit fundraising, only Phases 0 and 1 would proceed with approval of this option.
 - b. Continue stables boarding and programming, applying the same approaches for phasing, management, and programming presented in the Ad Hoc Committee Option but utilizing an alternate site plan option as modified by staff; option includes a non-profit entity to manage, operate, and fundraise for the stables; option involves the District funding and completing certain annual maintenance and repairs (to be negotiated) and all capital improvements and site cleanups for the modified Phases 0 and 1; since the modified Phase 2 is dependent on future non-profit fundraising, only the modified Phases 0 and 1 would proceed with approval of this option.
 - c. Replace the horse boarding and public programming with a lower intensity horse experiential opportunity for the public; option substantially reduces the scale and cost of site improvements; includes six-month relocation period for existing boarded horses.
 - d. Close the Stables, allowing for a six-month relocation period for existing boarded horses.
2. Authorize the General Manager to negotiate with the current operator for a short-term agreement for stables operation during the transition period regardless of which long-term option is selected.
3. If Option 1 (a) or 1 (b) is selected, direct the General Manager to return with the following for Board consideration:
 - a. A set of defined milestones related to formation, operations, and fundraising targets for the non-profit entity that would need to be met before the District enters into a construction contract and substantially invests in and completes the Phase 1 improvements.

- b. A draft operating contract to enter with a non-profit entity that identifies clear roles, responsibilities and expectations, including onsite maintenance and repair responsibilities.
- c. A hiring plan for new District staff to address annual maintenance and capital repair needs at the stables.

SUMMARY

On May 14, 2024, the Midpeninsula Regional Open Space District (District) Board of Directors (Board) received an update on the Bear Creeks Stables Capital Maintenance and Repair Project (Repair Project), including County permit status, increasing project construction costs, and long-term stables operational costs. Given the cost escalation of the Repair Project, the Board reviewed several long-term stables options ranging from closing the stables to reducing boarding and/or programming. After deliberation, the Board decided to form an Ad Hoc Committee to work with community members to explore and develop potential additional option(s) and return to the full Board in approximately four months.

The option developed by the Ad Hoc Committee, and refined options previously presented at the regular meeting of May 14, 2024, are now before the Board for a final decision on the long-term use and management of the Stables site.

PROPERTY HISTORY AND PROJECT BACKGROUND

For a background on the property acquisition, and a detailed explanation of the legal non-conforming use designation of the Stables site that triggers major, high-cost conditions of approval requirements to obtain the necessary County permits for the site repairs, please refer to Attachment 1. Attachment 1 also lays out the history and descriptions of all the various project options that the Board previously reviewed and considered for the site, including the options presented at the May 14, 2024 regular meeting. Additional information can also be found in Attachment 2 (May 14, 2024 Board report).

OPTION 1 (a) - AD HOC COMMITTEE OPTION

The Ad Hoc Committee Option is the result of extensive work over a five-month period by the Ad Hoc Committee, which comprised of Directors Gleason (Chair), Holman, and Riffle. The Ad Hoc Committee members worked jointly with self-selected community members as part of one of the following three working groups to explore various ideas and implementation approaches for Bear Creek Stables:

- Operations & Programming
- Site Design, Architecture & Engineering
- Fundraising & Partnership

Please refer to Attachment 3 for a detailed background on the Ad Hoc Committee formation and the working group process. The Ad Hoc Committee and working groups developed a set of recommendations that were ultimately assembled into one proposed use and management option for the site. The Ad Hoc Committee Option proposes to implement a phased approach to site improvements, programming, and fundraising within a non-profit management model that would manage, operate, and fundraise for ongoing operations and certain site improvements. Under this model, the District would retain responsibility for annual maintenance activities (e.g., driveway

repairs, reroofing of structures, water line repairs) and all Phase 0 and Phase 1 site clean-up and capital improvements (see list of phased improvements in the following section).

Components of the Ad Hoc Committee Option

The Ad Hoc Committee Option proposes a phased approach to incrementally implement site improvements, expand programming, and conduct fundraising. Early programming focuses on smaller, community-based activities, with public programming opportunities expanding as site improvements are completed over three different phases. The Ad Hoc Committee Option aims to serve large and diverse communities with programming that grows over time and leverages the stables and horses as well as the surrounding open space preserve setting. Under this option, the District would be responsible for the Phase 0 and Phase 1 capital costs and workplan implementation. Future capital improvements identified in Phase 2 would be dependent on fundraising by the non-profit entity. Since Phase 2 is speculative at this time, the work under Phase 2 would require subsequent approval from the Board at a future date. For the phased site improvements, the Ad Hoc Committee Option includes a request for District staff to work with members of the Site Design, Architecture & Engineering Working Group and Operations & Programming Working Group to resolve any remaining site improvement options that may require more discussion – these are not expected to result in additional costs for Phases 0 and 1.

The phased approach is further described below.

Phase 0: Would begin immediately upon plan adoption and leverage existing facilities to build momentum through:

- Volunteer-led programming, such as school visits and nature education, to jumpstart public programming and engage the community.
- Site cleanup, essential minor repairs, and fire safety improvements.
- Early fundraising efforts focused on securing operational funds, raising community awareness, and establishing initial partnerships.
- Building funding relationships to lay the groundwork for obtaining capital grants.

Phase 1: Would start once required approvals have been obtained (County conditional use permit, regulatory permits, and building permits) and include:

- Increased public programming, including such offerings as equine interaction programs, and community events to reach underserved communities.
- Expanded fundraising efforts to target grants, private donors, and partnerships to support infrastructure improvements, subsidize programming, and initiate capital fundraising.
- Enhanced site functionality with the District completing the Phase 1 site improvements, including:
 1. Improving the upper road as the main 2-lane entry/exit path and retaining the lower road as a single lane restricted to staff and ADA access. Rationale: Eliminates most vehicle traffic into the lower programming area, provides ADA accessibility, and greatly enhances public safety.
 2. Locating the public parking area at the intersection of the upper and lower roads, commonly called the “Y.” Rationale: Saves cost and improves traffic flow.
 3. Installing 2-3 small prefab barns for hay storage. Rationale: Reduces costs, improves operational efficiency, and reduces waste of stored feed.
 4. Using gravel surfaces on areas traveled by horses wherever possible. Rationale: Necessary for equine and rider safety.

5. Locating the Caretaker cottage and ADA-compliant restrooms/parking on the north side of the lower arena. Rationale: Creates more programming areas, reduces cost, and improves accessibility.

Phase 2: Implemented when sufficient non-profit fundraising monies becomes available, and milestones are met during earlier phases:

- Expand programming to incorporate therapeutic activities, nature education, and larger public events.
- Pursue larger capital contributions, corporate sponsorships, and long-term partnerships to sustain and grow programming and operations
- Rely on financial milestones to complete longer-term projects such as the renovation of the Tevis barn and further site enhancements, including, new paddocks/corrals in the upper meadow area.

Management Model: The Ad Hoc Committee Option proposes a non-profit management model to operate Bear Creek Stables, deliver programs, and conduct fundraising. Under this model, the non-profit entity would seek grants, fees, individual and corporate donations, hold fundraising events, etc., to support programs and expand beyond the Phase 0 and Phase 1 site repairs and improvements made at the site, such as restoring the Tevis Barn. As part of this model, the District is asked to consider authorizing the non-profit operator to contract for and manage some capital projects as a way to potentially reduce costs.

Additional details on the Ad Hoc Committee Option are provided in their summary report (Attachment 4).

OPTION 1 (b) - STAFF-MODIFIED SITE PLAN OPTION

The Ad Hoc Committee's Site Design, Architecture and Engineering Working Group worked to identify various site improvements and modifications to the original Repair Plan that would reduce costs and improve site functionality for programming. Staff reviewed the proposed site improvements and provided constructive feedback. Through active discussion and collaboration, general agreement was reached on most elements that would either reduce or defer costs. Only two significant proposed changes to the original Repair Plan listed as Phase 1 were not supported by staff:

- Road improvements
- Location of the Caretaker cottage and ADA-compliant restrooms/parking

The Site Design, Architecture and Engineering Working Group recommends improving the upper road as the main two-lane entry/exit access road to meet fire access requirements in Phase 1 and retaining the lower road as a single lane restricted to staff and ADA access. Their goal is to eliminate most vehicle traffic into the lower programming area to enhance public safety. While staff understand the rationale, if a repair option is selected by the Board, staff recommend retaining the original Repair Plan's road improvement design, which instead widens the lower road to a two-lane road in Phase 1 to meet fire access requirements. This poses a significant cost savings and reduces the overall construction footprint, therefore reducing impacts to natural habitat and tree removal. Staff also recommend retaining the location for the Caretaker Cottage and ADA-compliant restrooms/parking as originally designed in the Repair Plan (near the Tevis Barn) for operation and programming efficiency.

Consistent with the information discussed above, the Staff-Modified Site Plan Option that is presented as Option 1 (b) for Board consideration incorporates most modifications identified in the Ad Hoc Committee Option with the following changes:

- Phase 1 - Road Improvement: Retain the original road improvement design, widening the lower road to a two-lane road to meet fire access requirement. Rationale: substantially reduces costs and reduces the level of ground disturbance.
- Phase 1 - Caretaker Cottage and Restroom: Retain the location for the Caretaker Cottage and ADA-compliant restrooms/parking near the Tevis Barn. Rationale: for operational and programming efficiency.
- Phase 2 - Upper Meadow: Retain the original Bear Creek Redwoods Preserve Plan intent to keep the upper meadow separate from equestrian uses and revegetate the hillside, precluding its future use for paddocks/corrals. Rationale: remain consistent with the Preserve Plan to restore the natural resource values of the hillside and upper meadow and address sedimentation issues.
- There are also minor miscellaneous site improvement differences between the two options to reduce costs and ease long-term maintenance. For example, the Staff-Modified Site Plan Option calls for removing the stone fireplace from the demolished caretaker residence (versus retaining) and installing one large water tank (versus multiple smaller water tanks).

Capital Improvement Cost Comparison Analysis of Options 1 (a) and 1 (b)

Given the uncertainty of funding to complete Phase 2 work, which depends on future fundraising by a non-profit operator, only Phase 0 and Phase 1 costs are shown in the following table. If Option 1 (a) or 1 (b) is approved by the Board, the fiscal impact to the District for capital improvements would be the cost shown in the TOTAL line. Details of the cost analysis for Phase 0 and Phase 1 are included in Attachment 5. Line item costs for Phase 2 elements are provided in Attachment 6 to give the Board an indication of the additional costs to pursue Phase 2 (using 2032 dollars) if this phase is completed in the future. Costs for Options 1 (a) and 1 (b) are also shown in comparison to the original May 14, 2024 Repair Plan costs for additional context.

	Original May 14, 2024 Repair Plan	Ad Hoc Committee Option Option 1(a)	Staff-Modified Option Option 1(b)
Phase 0	\$86,520	\$165,620	\$146,420
Phase 1	\$10,433,500	\$8,488,700	\$7,427,200
TOTAL	\$10,520,020	\$8,654,320	\$7,573,620
Soft costs *	\$450,000	\$500,000	\$450,000

* Separate from capital construction costs, the District has incurred \$755,000 in consultant costs to date (feasibility studies, designs, permit application preparation). The soft costs listed above would be needed to complete the Project (final plans, as-builts, construction administration, and, if needed, additional assessments and studies such as geotechnical, structural, and biological).

The cost estimates provided above were developed based on the original Repair Plan cost estimate that was presented to the Board in 2019 and anticipated cost escalation associated with each phase of the project, which is the same method used to develop the cost estimates for the May 14, 2024 Board meeting. For the purposes of these estimates, Phase 0 improvements are assumed to be implemented in 2025 and Phase 1 improvements are assumed to start implementation in 2027. Final costs will be confirmed based on final engineered plans and the year of implementation.

Both Options 1(a) and 1(b) would likely require approximately 24 to 30 months to complete the Phase 1 design, permitting, bidding and contracting with the likelihood of Option 1(b) completing sooner due to less extensive design, geotechnical studies, and permitting to accommodate the upper road improvements.

Compared to the \$10,520,020 total cost for the original Repair Plan, the Phase 0 and Phase 1 cost is approximately \$8,654,320 for the Ad Hoc Committee Option, providing \$562,000 in cost savings as a result of value engineering, \$2,493,000 in cost reductions due to deferrals of project elements to future phases, and \$1,316,100 in cost increases for new project elements. The Staff-Modified Option cost is approximately \$7,573,620, providing \$487,000 in cost savings, \$2,493,000 in cost reductions due to deferrals of project elements to future phases, and \$256,900 in costs increases for new project elements. The key driver of the cost difference between the Ad Hoc Committee Option and Staff-Modified Option are the road improvements associated with the upper versus lower road.

District Considerations and Costs for the Non-Profit Management Model

The Ad Hoc Committee Option [Option 1 (a)] proposes a non-profit management model for the Stables. This same management model is assumed for the Staff-Modified Site Plan Option [Option 1 (b)]. To pursue a non-profit management model, the District would need to consider taking the following subsequent actions:

- Enter into an agreement with a non-profit entity that identifies a set of milestones, initial fundraising goals, and agreed-upon steps toward the transfer of management. The agreement should include specific objectives that need to be achieved by the non-profit before the District enters into a construction contract to substantially invest in and complete the Phase 1 improvements since the benefit of the Phase 1 improvements will depend on the sound and successful establishment of a viable non-profit operator entity.
- Develop an operating contract with a non-profit entity that identifies clear roles, responsibilities, and expectations for each party, including onsite maintenance and repair responsibilities.
- Develop a staff hiring plan to address annual maintenance and capital repair needs at the stables and avoid workload capacity constraints (see more explanation below).

The non-profit operational model was developed by the Ad Hoc Committee based on the District's agreement for managing Deer Hollow Farm. Deer Hollow Farm operates under a four-way partnership between three public agencies and one non-profit organization to maintain the facilities and run the programs. In this partnership, the County of Santa Clara provides an annual contribution for public programming while the City of Mountain View hires the staffing and covers most expenses to run the farm and programs (i.e., camps, special events, tours, etc.). Mountain View's programming costs are partially offset by fees. The Friends of Deer Hollow Farm provide volunteer support and a fundraising contribution to help fund programs and site repairs, raising approximately \$2.5M over 30 years. Various foundations, individual donors, and the cities of

Cupertino and Los Altos provide funding to the Friends of Deer Hollow Farm. The District is primarily responsible for maintenance and repairs, dedicating a full-time Farm Maintenance Worker for the Deer Hollow Farm site. Large capital repairs are negotiated and often cost-shared between Mountain View and the District, with contributions at times provided by the Friends group.

If the District were to assume primary responsibility for annual maintenance at Bear Creek Stables, the annual operating cost to the District would significantly increase from a standard Stables concessionaire model, which normally places the responsibility for site maintenance and periodic repairs on the operator. Note that due to the current suspension of revenue-generating public programs that allow an operator to cover site repair costs, the current operator is not conducting annual maintenance repairs and currently only performs horse feeding and stall cleanout. As a reminder, programming ceased in April 2024 due to insufficient insurance coverages from the operator for public programming activities. Moreover, following Board direction to refrain from completing additional site improvements during the Ad Hoc Committee process, the dilapidated paddocks that were removed prior to May have not yet been replaced. The combination of no programming and reduced boarding reduced revenue potential to the point that the District relieved the operator from paying the monthly rent (5% of gross revenues) and monthly maintenance fund contribution (5% of gross revenues) to retain them in the interim and sustain the boarder program until the Board makes a final decision for the Stables site. During this time, the District has been taking over structure and site maintenance responsibilities.

Under the non-profit management model, the District's estimated operational cost for repair and maintenance responsibilities at Bear Creek Stables is calculated at approximately \$300,000 per year. This amount has been adjusted down from the \$350,000 estimate in the May 14, 2024 report ([R-24-58](#)) based on cost refinements. This annual cost covers one primary assigned full-time position (including salary and benefits), approximately 1/4th time for their supervisor to coordinate their work and handle ongoing discussions with the non-profit Stables operator, 1/10th time for a property management staff member to handle the overall management of the operator agreement, and additional costs associated with vehicle/machinery use and supplies/materials. This cost would increase annually per inflation and yearly increases in salary and benefits costs. In practice, a full-time employee may not need to always be on site, but that absence would be offset by times when a larger crew of 4 to 5 field staff are onsite to perform maintenance and/or repair work.

The District's detailed operational cost is presented below.

Annual District Costs for Stables Repair and Maintenance Under Options 1 (a) & (b)		
Staff Position	Number of Positions	Cost (per year)
Maintenance Supervisor	0.25	\$47,420
Farm Maintenance Worker	1	\$134,796
Property Management Specialist I/II	0.1	\$18,968
Sub-Total	1.35	\$201,184
Vehicles and Machinery		
<i>F-150 Lightning and Tractor</i>	<i>Depreciated for annual cost</i>	\$16,600
Sub-Total		\$217,784
Annual Services and Supplies Budget		\$78,000

Total Annual Operating Costs		\$295,784 (~300,000)
-------------------------------------	--	-----------------------------

Note that the District’s total annual operating costs will be dependent on the level of annual maintenance and repairs that is undertaken by the District. The number shown above assumes that most of the annual repairs and maintenance work (not including the feeding of horses and cleaning of stalls, and other daily housekeeping activities) are the responsibility of the District, based on discussions to date with the Ad Hoc Committee and working groups. However, a lower cost could apply if additional maintenance responsibilities can be negotiated and transferred to the non-profit operator. For example, the non-profit operator could be responsible for all repairs and maintenance of equestrian-related infrastructure, water distribution system, riding rings, paddocks, and hay barns, while the District could be responsible for roads, fire clearance, and the residential structure. It may be unlikely that during at least the early phase(s), enough boarding and programming revenues would be generated for a non-profit operator to cover all the maintenance and repair costs associated with the Stables given the early focus on community equestrian exposure programming versus pay-by-fee, revenue-generated programming, such as riding lessons, trail rides, and equestrian camps. Conversely, the non-profit operational model may be more attractive to potential donors in supporting fundraising efforts for the Phase 2 capital improvements.

Fee Structure

Basing the fee structure per the Ad Hoc Committee Option, under a non-profit operational model, the concessionaire monthly rental fee (5% of gross revenues) would be eliminated, and the percentage of the operator’s monthly gross revenues that go into a maintenance fund may be reduced (3% versus 5%), subject to negotiation. These changes would allow the non-profit operator to retain and utilize a larger portion of the revenues to operate the site, manage programs, and potentially set aside a portion of revenues for future capital repairs that are not completed by the District. Note, however, that a different rental fee and maintenance fund fee could potentially be negotiated with the non-profit operator, if the numbers pencil out and can be agreed upon by both parties. However, it is uncertain at this time whether enough revenues could be generated by the operator to manage a different fee structure, particularly during the early phase(s).

The table below details the differences in payment to the District between a more standard concessionaire model and the Ad Hoc Committee’s non-profit model.

Comparison of Annual Operating Costs and Revenues Based on Current Agreement and Ad Hoc Option		
	Prior Concessionaire Agreement	Non-Profit Model
Annual District Operational Cost	~\$20,000	Up to \$300,000
Annual Revenue to District	5% of gross revenue	\$0
Contribution to Maintenance Fund	5% of gross revenue	3% of gross revenue (per the financial projections, subject to negotiations)

OPTION 1 (c) – HORSE EXPERIENTIAL OPTION

Option 1 (c) provides a lower intensity horse experiential opportunity for the public. Under this option, 2 to 3 horses would be kept onsite for public viewing with equestrian exposure programming, such as talks regarding horse husbandry. No riding lessons or camps would be provided, and no commercial horse boarding would exist. Given the limited number of horses that would either be brought in for programming or kept onsite, a reduced number of facilities would be retained, repaired, and maintained over the long term. Boarding would continue for up to 6 months to allow boarders to find other accommodations. This option includes the following considerations:

1. A Use Permit with the County may still be required for the reduced site improvements. Depending on County permitting requirements, the associated repairs and permit conditions may cost approximately \$3.0 to \$3.5 million;
2. If improvements are still required for any of the three main barns to sustain the use, a Building Permit will likely be triggered, requiring fire access conditions and building code compliance. Use of the barn(s) would be dependent on whether the horses board onsite or whether they are transported in for the day based on the programming schedule.
3. The estimated operational cost is \$120,000 per year for the first 10 years and \$90,000 per year afterwards to conduct basic vegetation management and restoration that allows the site to return to a natural vegetated state, and for site maintenance of select facilities that remain to facilitate the onsite programming.

OPTION 1 (d) – CLOSE STABLES OPTION

This option includes removing most of the existing structures with potentially only the Tevis Barn remaining (note: Tevis Barn is not deemed to be historically significant) and returning the site to a natural vegetated state. This option is the least impactful to District short-term and long-term financial and staffing resources and returns much of the site to a natural condition. No equestrian programming would be offered and no public vehicular access would be necessary. Instead, the site can be opened to public access via the surrounding trail network to expand upon the Preserve's open space trail experience. Boarding would continue for up to 6 months to allow boarders to find other accommodations. This option includes the following considerations:

1. Stabilization of one structure (if desired) – Tevis Barn. Project scope and permit requirements are unknown at this time for this structure.
2. Cleanup and site restoration would cost approximately \$1 to \$2 million.
3. The estimated operational cost is \$30,000 per year for 10 years to conduct basic vegetation management and restoration that allows the site to return to a natural vegetated state.

FISCAL IMPACT

At the April 2019 meeting, the Board selected the Repair Project option with an estimated construction cost of between \$4M and \$4.4M. At the April 2020 meeting, the Board approved an allocation of \$1.223M of available interest income from Measure AA Bond Proceeds to close the known funding gap that existed at that time to implement the Repair Project, capping the current Board-approved project budget at \$5.623M. Since 2020, the costs have increased substantially,

requiring the Board to confirm the next steps for this project. The updated project options before the Board and their associated costs are shown below:

Option	Capital Costs	Annual Operational Costs
Option 1 (a) Ad Hoc Committee Option	\$8,654,320*	Up to \$300,000 **
Option 1 (b) Staff Modified Repair Option	\$7,573,620*	Up to \$300,000**
Option 1 (c) Horse Experiential Option	\$3,000,000 - \$3,500,000	\$120,000 for first 10 years, \$90,000 after 10 years
Option 1 (d) Close Stables	\$1,000,000 - \$2,000,000	\$30,000 for 10 years

***Only includes capital costs for Phase 0 and Phase 1.** At this time, the Board would only be approving Phases 0 and 1 since Phase 2 is contingent on future fundraising.

**** Depends on how an agreement between an operator and the District divides responsibilities and what if any payments are made to the District.** Costs would be offset by fees either paid to the District or placed in a maintenance fund, if available for District use; annual inflation increases would apply.

The FY25 amended budget includes \$222,807 for the Bear Creek Stables Project MAA21-004. The FY25 proposed budget should be sufficient to move forward with any option this fiscal year. Funds for future year costs will be updated to reflect whichever decision is made by the Board and recommended in future fiscal year budgets as a part of the annual Budget and Action Plan process.

MAA21-004 - Bear Creek Stables Project	Prior Year Actuals	FY25 Amended	FY26 Projected	TOTAL
District Funded (Fund 30):	\$1,230,837	\$222,807	\$2,710,998	\$4,164,642
Fund 30 Interest Income:	\$0	\$0	\$1,223,000	\$1,223,000
District Funded (Fund 40):	\$0	\$0	\$527,000	\$527,000
Total Budget:	\$1,230,837	\$222,807	\$4,460,998	\$5,914,642*
Spent-to-Date (as of 11/13/24):	(\$1,230,837)	\$0	\$0	(\$1,230,837)
Encumbrances:	\$0	(\$92,419)	\$0	(\$92,419)
Current Budget Remaining:	\$0	\$130,388	\$4,460,998	\$4,591,386

**Future projected costs based on the FY25 Budget and Action Plan. Future fiscal year projections are preliminary and will be revisited as part of the annual Budget and Action Plan process.*

The following table outlines the Measure AA (MAA) Portfolio 21 Bear Creek Redwoods — Public Recreation and Interpretive Projects allocation, costs-to-date, projected future project expenditures and projected portfolio balance remaining. Depending on what option the Board selects, including soft costs, the portfolio balance would range from a positive balance of \$4.1M if Option 1(d) is chosen to a negative portfolio balance of \$4.1M if Option 1 (a) is chosen. Additional funding to complete the Bear Creek Stables project will need to be covered by General Fund monies.

MAA21 Bear Creek Redwoods — Public Recreation and Interpretive Projects Portfolio Allocation:	\$17,478,000
Grant Income (through FY27):	\$5,061,090
Interest Income Allocation:	\$2,709,000*
Fund 40 Allocation:	\$977,000
Total Portfolio Allocation:	\$26,225,090

Life-to-Date Spent (as of 11/13/24):	(19,631,683)
Encumbrances:	(455,408)
Remaining FY25 Project Budgets:	(71,787)
Future MAA21 project costs (low range to high range option projection):	(1,994,830) to (10,149,150)^
Total Portfolio Expenditures:	(\$22,153,710) to (\$30,308,030)
Portfolio Balance Remaining (Proposed):	\$4,071,380 to (\$4,082,940)

*Includes the Board-approved allocation of \$1.223M in available interest income on Measure AA Bond Proceeds for the Bear Creek Stables project and \$1.486M for Phase II Trail Improvement project.

^Future projected costs based on the approved FY25 Budget and Action Plan. Also added to this figure is 1M for the low range option and 8.7M for the high range option. Future fiscal year projections are preliminary and will be revisited as part of the annual Budget and Action Plan process.

The following table outlines the Measure AA Portfolio 21 allocation, projected life of project expenditures and projected portfolio balance remaining.

MAA21 Bear Creek Redwoods — Public Recreation and Interpretive Projects Portfolio Allocation:	\$17,478,000
Grant Income (through FY27):	\$5,061,090
Interest Income Allocation:	\$2,709,000
Fund 40 Allocation:	\$977,000
Total Portfolio Allocation:	\$26,225,090
Projected Project Expenditures (life of project):	
21-001 Moody Gulch Fence & Gate Improvements	(\$847)
21-004 Bear Creek Stables Project (Low Range to High Range Option)	(\$2,230,837) to (\$10,385,157)
21-005 Bear Creek Redwoods Public Access	(\$5,548,003)
21-006 Bear Creek Redwoods - Alma College Cultural Landscape Rehabilitation	(\$5,704,734)
21-007 Bear Creek Redwoods Preserve Plan Invasive Weed Treatment	(\$1,974,754)
21-008 Bear Creek Redwoods Ponds Restoration and Water Rights	(\$681,517)
21-009 Bear Creek Redwoods Webb Creek Bridge	(\$487,492)
21-010 Bear Creek Redwoods Landfill Characterization and Remediation	(\$511,731)
21-011 Phase II Trail Improvements, Bear Creek Redwoods OSP	(\$4,922,880)
21-012 Bear Creek Redwood Tree Restoration	(\$90,915)
Total Portfolio Expenditures:	(\$22,153,710) to (\$30,308,030)

Portfolio Balance Remaining (Proposed):	\$4,071,380 to (\$4,082,940)
--	--

PRIOR BOARD AND COMMITTEE REVIEW

Since the approval of the Preserve Plan, this Project previously came before the full Board at the following public meetings:

- **December 15, 1999:** The Board adopted an amendment to the preliminary use and management plan for Bear Creek Redwoods Open Space Preserve to continue horse boarding facility use and authorized the General Manager to execute a stables rental agreement. ([R-99-159](#), [meeting minutes](#))
- **October 14, 2015:** The Board approved the assignment and amendment of the Bear Creek Stables Rental Agreement from Glenda Smith to Pamela Ashford. ([R-15-146](#), [meeting minutes](#))
- **January 25, 2017:** The Board adopted a resolution certifying the Final Environmental Impact Report, adopting the Findings of Fact and Statement of Overriding Considerations, approving a Mitigation Monitoring and Reporting Plan, and approving the Bear Creek Redwoods Preserve Plan. ([R-17-15](#), [meeting minutes](#))
- **April 25, 2019:** The Board considered various project options for the Stables and directed staff to move forward with Deferred Maintenance Repairs at the Stables in the near-term and the Preserve Plan Site Design as a long-term solution. ([R-19-53](#), [meeting minutes](#))
- **September 25, 2019:** The Board received an FYI memorandum on the revised scope and fee for the design consultant, John Northmore Roberts & Associates. ([FYI Memo](#))
- **October 9, 2019:** The Board directed the General Manager to refrain from pursuing a public-private fundraising endeavor and focus on implementing Deferred Maintenance Repairs. ([R-19-131](#), [meeting minutes](#))
- **April 8, 2020:** The Board directed the General Manager to allocate \$1.223M of the available Interest on Measure AA Proceeds to close the known funding gap to implement the Stables Project. ([R-20-34](#), [meeting minutes](#))
- **June 09, 2021:** The Board received an update on the Bear Creek Stables Project, including its legal non-conforming permitting status and challenges therein, and affirmed the Use Permit permitting approach. ([R-21-74](#), [meeting minutes](#))
- **July 14, 2021:** The Board approved operational requirements, concessionaire selection criteria, and agreement terms for a new concessionaire at Bear Creek Stables. ([R-21-98](#), [meeting minutes](#))
- **August 24, 2022:** The Board authorized the General Manager to enter into a Concessionaire Agreement for Bear Creek Stables with Chaparral Country Corporation. ([R-22-99](#), [meeting minutes](#))
- **May 14, 2024:** The Board received an update on the Repair Project and reviewed several long-term stables options. The Board voted to form an Ad Hoc Committee to work with community members to explore and develop potential additional options and return to the full Board in approximately four months. ([R-24-58](#), [meeting minutes](#))

PUBLIC NOTICE

Public notice was provided as required by the Brown Act. Bear Creek Redwoods interested parties plus the Stables boarders were notified of the public meeting. Additionally, a notice was also posted at the Stables location.

CEQA COMPLIANCE

The Bear Creek Redwoods Preserve Plan Environmental Impact Report (EIR) analyzed the Stables Site Plan. The Board certified the Final EIR on January 25, 2017. The EIR evaluated project elements associated with the repair plan and nearly all elements associated with the Ad Hoc Committee Option except for the expansion of paddocks/corrals in the upper meadow that is part of Phase 2. Implementation of the Ad Hoc Committee Option - with the exception of expansion of the boarding facilities into the upper meadow - and the staff modified Repair Plan would not result in new significant effects or a substantial increase in the severity of previously identified significant effects; therefore, no additional environmental review is necessary. If the Board supports the expansion of boarding facilities into the upper meadow, additional environmental review of that project element will be necessary as part of subsequent Phase 2 approvals.

NEXT STEPS

If the Board approves either Option 1 (a) or 1 (b), staff will proceed with design development, permitting, and phased implementation of Phases 0 and 1. Staff will also return to the Board with the following:

- i. A set of defined milestones related to formation, operations, and fundraising targets for the non-profit entity that would need to be met before committing to enter into a construction contract to complete the Phase I site improvements.
- ii. A draft operating contract to enter with a non-profit entity that identifies clear roles, responsibilities and expectations, including onsite maintenance and repair responsibilities.
- iii. A hiring plan for new staff to support stables operations.

If the Board supports Option 1 (c), staff will proceed with design development, permitting and implementation to remove most of the facilities and retain only those necessary to support the Lower Intensity Horse Experiential Opportunity. Staff would explore partnership opportunities for retaining 2 to 3 horses on site available for public viewing.

If the Board supports Option 1 (d) to close the stables, staff will proceed with design development, permitting and implementation for demolition and site restoration.

Attachments:

1. Property History and Background
2. May 14, 2024 Board Report
3. Ad Hoc Committee Formation and Working Group Process
4. Bear Creek Stables Ad Hoc Committee Summary Report and Recommendations, dated November 4, 2024
5. Phase 0 and Phase 1 Site Design Cost Comparison Table
6. Phase 2 Line-item Cost Projection Table

Responsible Department Head:
Ana Ruiz, General Manager

Prepared by:
Susanna Chan, Assistant General Manager
Brian Malone, Assistant General Manager
Jason Lin, Engineering & Construction Manager
Brandon Stewart, Land & Facilities Manager
Gretchen Laustsen, Senior Planner
Mark Brandi, Senior Project Manager

Staff Contact:
Susanna Chan, Assistant General Manager

PROPERTY HISTORY AND BACKGROUND

In 1999, the District acquired a 260-acre property in unincorporated Santa Clara County (County), south of Monte Sereno and Los Gatos, establishing Bear Creek Redwoods Open Space Preserve (Preserve). This acquisition included an equestrian stable (Stables) that has been in continuous operation since the 1940s. The Stables has operated under a legal, non-conforming use designation since 1975. A 'non-conforming use' refers to a lawful use that has existed prior to the effective date of zoning and building requirements and has continued since that time without conformance to current ordinances ([§ 4.50 of the Santa Clara County Zoning Ordinance](#)). The Stables is allowed to board up to 72 horses under the legal non-conforming use designation. Due to only very basic and minimal maintenance over many decades of being leased and managed by a series of small-scale operators, the Stables are now in need of major capital improvements for its continued operation.

On April 25, 2019, the Board considered five stables project options (Preserve Plan Site Plan, Maintenance and Repairs, Close Stables, Sell or Lease, Relocate). At that meeting, the Board directed staff to move forward with the Repair Project at a cost of \$4 to \$4.4 million to maintain current equestrian programming, implement key repairs, and incorporate Americans with Disabilities Act (ADA) requirements.

On June 9, 2021, the Board received an update on the Repair Project, including the legal non-conforming use status and challenges therein. At the meeting, the Board approved the pursuit of a Use Permit to facilitate County approvals for the Repair Project. Since that time, staff have prepared the Use Permit application and worked on three rounds of comments with the County. On March 22, 2023, the Board directed staff to address Use Permit Conditions using an alternate means and methods approach, known as the [Application for Use of Alternate Materials, Methods of Construction, or Modification of Code](#) (AMMR) to reduce the scale, cost and environmental impacts of certain conditions of approval and remain as close to the Repair Project budget as possible. In February 2024, the County Fire Marshal provided a response letter indicating that the AMMR was not approved and stating that the full baseline fire suppression system is required to meet current fire code. The fire suppression system requirements increase Project costs by an additional \$1.2M to \$1.4M. In addition to the fire code requirements imposed by the County, the original Repair Project construction costs have increased significantly since 2019 due to inflation (another \$1.4M to \$1.6M).

On August 24, 2022, the Board selected Chaparral to be the operator for the Stables. On June 1, 2023, Chaparral formally assumed operations, including boarding operations and equestrian programming. During protracted litigation to remove the previous operator and continuing into calendar year 2024, District staff have spent considerable time and resources conducting onsite repairs, maintaining infrastructure, ensuring water availability, managing the operator, and addressing boarder and public concerns regarding the operation and facility conditions. On April 4, 2024, the District suspended camps, trainings, riding instruction, and other equestrian events at the Stables due to issues associated with the operator meeting the insurance requirements for these specific uses. This status remains pending a final Board decision on the long-term use and management of the Stables site.

On May 14, 2024, the Board received an update on the Stables, including County permit status, increasing Repair Project costs and long-term operational costs. Construction costs for the

repairs increased significantly with an updated estimated of between \$9.5 and \$10.5 million (includes water system costs and improvements to the boarder area), with a new starting construction date estimated to be January 2027. Costs increased significantly primarily due to County fire and building permit requirements and mitigation requirements (at an additional cost of \$1.75M to \$2.15M), inflation (another \$1.4M to \$1.6M), and inclusion of the boarder area improvements (\$1.5M). Additionally, since 2019, the District gained hands-on experience on the level of District operational resources necessary to adequately oversee, support, and manage the Stables operation. If the Stables continues to operate, staff anticipated direct staffing (salary and benefits costs) and services and supplies costs of over \$350,000 annually to address ongoing repair and maintenance needs for the Stables operation.

In order to maintain the Stables operations for boarding and public programing over the long-term, numerous capital repairs are required given the condition of the facilities and overall site. On May 14, 2024, due to the cost escalation of the original Repair Project and associated long-term operational costs, the Board considered multiple stables options, including:

- **Close the Stables**

Remove majority of existing structures with potentially only the Tevis Barn remaining and provide site restoration (note: Tevis Barn is not deemed to be historically significant). No public vehicular access would be necessary. Public access would occur via trails that connect to the Alma Road Parking Area and to the future North Parking Area. This option requires the following considerations:

1. Stabilization of one structure (if desired) – Tevis Barn. Project scope and permit requirements are unknown at this time for this structure.
2. Cleanup and site restoration would cost approximately \$1 to \$2 million. Project scope and cost would be reduced significantly – upwards of +/- \$8.5 million.

- **Lower Intensity Horse Experiential Opportunity for the Public**

A number of different iterations could be considered to provide a lower intensity horse experiential opportunity for the public. One concept would be to bring two to three horses onsite that are accessible for public viewing with limited interpretation and horse exposure programming, including talks regarding horse husbandry. No lessons or horse camps would be provided and no horse boarding would exist. This option includes the following considerations:

1. A Use Permit with the County may still be required for the reduced site improvements. Depending on County permitting requirements, the project may cost approximately \$3.0 to \$3.5 million. The reduction in project scope would reduce costs by approximately \$7 million;
2. If improvements are still required for any of the three main barns to sustain the use, a Building Permit would likely be triggered, requiring fire access conditions and building code compliance. Use of the barn(s) would be dependent on whether the horses board onsite or whether they are transported in for the day based on the programming schedule.

- **Reduce Operation to Either Boarding or Programming Only**

This option includes a good deal of uncertainty. The current and former Stables operators expressed that their operations are dependent on boarder fees to cover fixed costs to operate the Stables site and programming is necessary to generate revenue to support a viable operation. It is likely that a boarder-only operation would fall to the District for operation due to lack of interest from a qualified operator. A programming-only operator may need to be subsidized by the District to cover fixed costs.

After reviewing and discussing various alternative options on May 14, 2024, the Board formed an Ad-Hoc Committee to explore additional option(s) for the site and directed the General Manager to bring the item back to the Board in approximately four months.

###



Midpeninsula Regional
Open Space District

R-24-58
Meeting 24-13
May 14, 2024

AGENDA ITEM 1

AGENDA ITEM

Bear Creek Stables Capital Maintenance and Repair Project Update and Confirmation on Next Steps

GENERAL MANAGER'S RECOMMENDATIONS *dm*

1. Receive an update on the Bear Creek Stables Capital Maintenance and Repair Project, County permit status, escalating project costs, and unanticipated long-term operational costs.
2. Given the cost escalation of the Repair Project and long-term operational costs, the General Manager recommends selecting an alternative option for the Stables:
 - a. Close the Stables, allowing for a six-month relocation period for existing boarded horses.
 - b. Replace the horse boarding and public programming with a lower intensity horse experiential opportunity for the public; option *substantially* reduces the scale of the repairs; includes six-month relocation period for existing boarded horses.
 - c. Reduce the Stables operation to only allow either horse boarding or programming; option *partially* reduces the scale of the repairs and requires a redesign of the Repair Project.
3. If horse boarding and/or public programming at the Stables site will continue, direct the General Manager to either return with a revised concessionaire agreement and proposal for additional District support staff and/or to prepare a hiring plan for approval of new staff if the District is to assume major portions of the operation.

SUMMARY

Given significant escalating costs of the Bear Creek Stables Capital Maintenance and Repairs Project (Repair Project) and anticipated long-term operational costs, the General Manager is returning to the Board of Directors (Board) for direction on the Repair Project and consideration of other options that reduce the scale of equestrian operations. In 2019, when the Board selected the Repair Project option, a targeted project construction budget of \$4.4 million was understood and agreed to by the Board. Recent new calculations estimate the construction costs at \$9.5 to \$10.5 million. This cost now includes improvements to the boarder area given deterioration of the conditions since 2019. The rise in costs also is due to the inclusion of Santa Clara County (County) code requirements, conditions of permit approvals for the Repair Project, and inflation.

Since 2019, the District has also gained hands-on experience on the level of District operational resources necessary to adequately oversee, support, and manage the Stables operation with a

concessionaire onsite. If the Stables continue to operate, staff anticipate direct staffing (salary and benefits costs) and services and supplies costs of over \$350,000 annually to continuously address repair and maintenance needs of the current Stables operation. In addition, it is anticipated that ongoing operational issues and public inquires and concerns regarding site conditions and management will continue to pull the time and attention of the District's maintenance crew and supervisorial and management staff from other priorities, reducing the effectiveness and timeliness of project delivery for Measure AA (MAA) projects and regular Preserve maintenance (including fire resiliency treatments, invasive vegetation management, and trail maintenance). Moreover, Chaparral Country Corporation (Chaparral), the current Stables concessionaire, has advised the District that they are not able to continue operations in the long term unless the District considers changes to the agreement to reduce costs and generate a greater margin of revenue.

Given the substantial increase in construction costs for the Repair Project and the negative operational impact to retain the Stables that is affecting staff delivery of other District priorities, MAA projects, and maintenance activities, the General Manager recommends considering either closure of the stables or a reduced operating model. It is unclear if there is concessionaire interest in a reduced operating option, so additional staffing costs on top of the \$350,000 annual costs are estimated for each project option should the District be required to fully operate various Stables programs.

PROJECT OPTIONS

Option A: Close the Stables

Capital Cost Estimate: **\$1 to \$2M**

Operational Cost Estimate: **\$30,000 per year for 10 years** for vegetation management for passive restoration

This option is the least impactful to District short-term and long-term financial and staffing resources and returns much of the site to a natural condition. No equestrian programming is offered, instead the site can be opened to public access via the surrounding trail network to expand upon the Preserve's open space trail experience. Boarding would continue for up to 6 months to allow boarders to find other accommodations.

Option B: Lower Intensity Horse Experiential Opportunity for the Public

Capital Cost Estimate: **\$3.0M to \$3.5M**

Operational Cost Estimate: **\$120,000 per year for 10 years** for vegetation management for passive restoration and site maintenance, **\$90,000 per year after 10 years.**

This option would not provide horse boarding or standard programming. Instead, 2 to 3 horses would be kept on site to provide viewing only with potential for some equestrian exposure (non-riding) programming via hike in only.

Option C: Reduce Operation to Either Boarding or Programming only

Capital Cost Estimate: **\$8.7M to \$9.7M**

Operational Cost Estimate: Boarding or programming by Concessionaire - **\$350,000 per year**
Boarding by District - **\$1.03M per year**

This option would limit the Stables operation to either boarding only or programming only. This option has the most uncertainty for both capital costs and operational costs; unknowns include permit conditions for a reduced operation, whether there is interest from a concessionaire for a reduced operation, and if programming operation would keep horses onsite or trailer them in.

Repair Project: Maintains existing Stables operations for boarding & public programming

Capital Cost Estimate: **\$9.5 to \$10.5 M**

Operational Cost Estimate: Boarding and programming by Concessionaire; District maintains and operates infrastructure - **\$350,000 per year**
Boarding by District; Concessionaire provides only programming - **\$1.03M per year**

Continuing the current permit pathway to implement the Repair Project would result in high up front capital costs, ongoing operational costs, and the need to divert staff resources to address ongoing Stables issues. These capital costs are for construction only and do not include planning and design cost. Under this scenario, both boarding and public programming remain as part of the Stables operation.

BACKGROUND

In 1999, the District acquired a 260-acre property in unincorporated Santa Clara County (County), south of Monte Sereno and Los Gatos, establishing Bear Creek Redwoods Open Space Preserve (Preserve). This acquisition included an equestrian stable (Stables) that has been in continuous operation since the 1940s. The Stables has operated under a legal, non-conforming use designation since 1975. A ‘non-conforming use’ refers to a lawful use that has existed prior to the effective date of zoning and building requirements and has continued since that time without conformance to current ordinances ([§ 4.50 of the Santa Clara County Zoning Ordinance](#)). The Stables is allowed to board up to 72 horses under the legal non-conforming use designation. Due to only very basic and minimal maintenance over many decades, the Stables are now in need of major capital improvements for its continued operation. The County’s interpretation of the County Zoning Ordinance does not allow the District to conduct necessary repairs at the scale needed for the District to continue operations over the long term. Under the legal nonconforming status, structural modifications are severely limited to 25% of the building’s construction valuation within any 12-month period and there is no variance or exception to this restriction in the code. In order to make substantial repairs to existing structures within a timely manner, and before the structures run the risk of structurally and functionally failing, the District must apply for and receive a discretionary Use Permit to then apply for and secure the required building permits for the repairs.

On April 25, 2019, the Board considered five stables project options (Preserve Plan Site Plan, Maintenance and Repairs, Close Stables, Sell or Lease, Relocate). At that meeting the Board directed staff to move forward with the Repair Project at a cost of \$4 - \$4.4 million to maintain current equestrian programming, implement key repairs, and incorporate Americans with Disabilities Act (ADA) requirements.

On June 9, 2021, the Board received an update on the Repair Project, including the legal non-conforming use status and challenges therein, and approved the pursuit of a Use Permit to facilitate County approvals for the Repair Project. Since that time, staff have prepared the Use Permit application and worked on three rounds of comments with the County.

On March 22, 2023, the Board directed staff to address Use Permit Conditions using an alternate means and methods approach, known as the [Application for Use of Alternate Materials, Methods of Construction, or Modification of Code](#) (AMMR) to reduce the scale, cost and environmental impacts of certain conditions of approval and remain as close to the Repair Project budget as possible. In February 2024, the County Fire Marshal provided a response letter indicating that the AMMR was not approved and stating that the full baseline fire suppression system is required to meet current fire code. The fire suppression system requirements increase Project costs by an additional \$1.2M to \$1.4M. The County did recently offer an alternative; however, this alternative does not significantly change the overall project cost. In addition to the fire code requirements imposed by the County, the original Repair Project construction costs have increased significantly since 2019 due to inflation (another \$1.4M to \$1.6M).

On August 24, 2022, the Board selected Chaparral to be the next operator for the Stables. On June 1, 2023, Chaparral formally assumed operations, including boarding operations and equestrian programming. During protracted litigation to remove the previous operator, and to this date, District staff have spent considerable time and resources conducting onsite repairs, maintaining infrastructure, ensuring water availability, managing the operator, and addressing boarder and public concerns regarding the operation and facility conditions. On April 4, 2024, District suspended camps, trainings, riding instruction, and other equestrian events at the Stables while Chaparral and District work together to determine appropriate levels of programming and associated insurance for the site.

See Attachment 1 for additional background details.

DISCUSSION

Santa Clara County Permitting Efforts

Below is the permitting timeline since the June 09, 2021 regular meeting when the Board approved the pursuit of a Use Permit to facilitate County permit approvals for the Repair Project.

- October 4, 2021 – Staff submitted the Use Permit application.
- November 14, 2021 – The County provided an incomplete letter without detailed Fire Marshal comments that required additional consultations, resulting in delays in obtaining and preparing responses to substantive Fire Marshal comments.
- December 2021 – May 2022 – Staff requested clarification from County Planning staff and formal comments from the Fire Marshal multiple times. Staff met with County Planning, Fire Marshal, Land Development Engineering, and Environmental Health to discuss County comments and request formal comments from the Fire Marshal. Staff prepared a variance request for the driveway width, a justification letter for a parking exemption, stormwater calculations, onsite water treatment system calculations, road sight distance analysis, and creek setback exhibits as part of a resubmittal package.
- May 11, 2022 - The Fire Marshal's Office provided informal comments via email.
- June 28, 2022 – The County provided detailed Fire Marshal comments as an addendum to the November 2021 incomplete letter.
- August 4, 2022 – Staff responded to the November 2021 incomplete letter and resubmitted the Use Permit application.

- September 2, 2022 – The County issued a second incomplete letter with detailed fire suppression system requirements. The letter also requested clarifications to the storm water questionnaire and more information on the onsite wastewater treatment system (OWTS). Fire Marshal comments included the requirement to widen the driveway to 24 feet (20 feet drivable width with an additional 2-foot shoulder on each side), necessitating the removal of over 30 riparian trees, and 350 feet of six- to eight-foot tall retaining walls.
- December 20, 2022 – Following multiple phone calls and emails to the Fire Marshal's Office in October, November and December, the Fire Marshal's Office confirmed the fire suppression assumptions, allowing the design consultant to proceed with system calculations.
- March 22, 2023 – Staff provided an update to the Board and received authorization to submit an Application for Use of Alternate Materials, Methods of Construction, or Modification of Code (AMMR) with alternative fire safety improvements to replace certain Fire Marshal requirements (including the driveway widening).
- June 30, 2023 – Staff submitted the AMMR.
- November 14, 2023 – The County issued a Plans Examination letter requesting revised plans and calculations. Staff subsequently met with the County shortly after to review the comments.
- February 9, 2024 – Staff resubmitted the AMMR application with information requested.
- February 29, 2024 – the County issued a letter denying the AMMR proposal and reiterating the 20-foot minimum driveway requirements.
- March 7, 2024 – Staff met with the County to discuss Fire Marshal comments and potential alternatives. At the meeting, County staff offered an alternative of providing one-way fire department access road by widening the upper road from the existing 8 to 9-foot width to 12 to 14 feet. Unfortunately, this alternative does not significantly reduce the total project cost due to significant grading and retaining walls to widen the upper road. Furthermore, this alternative requires additional engineering analysis and a formal County approval.

Repair Project Cost Estimate

At the April 25, 2019 Board meeting, the Board selected the Repair Project option at a Project Construction Cost of between \$4M and \$4.4M. That cost has increased significantly and is now estimated to be between \$9.5 and \$10.5 million (includes water system costs and improvements to the boarder area), with a new starting construction date of January 2027. Costs have increased significantly primarily due to County fire and building permit requirements and mitigation requirements (at an additional cost of \$1.75M to \$2.15M), inflation (another \$1.4M to \$1.6M), and inclusion of boarder area improvements (\$1.5M).

Below is a summary of the updated Project Construction Costs:

PROJECT COST ESTIMATE*	
Description	Cost Estimate
Deferred Maintenance Repair – 2019 costs	\$4.0M-\$4.4M
Escalation adjustment to Jan 2027	\$1.4M-\$1.6M
Fire and Building Permit Conditions	\$1.2M-\$1.4M
Mitigation Costs for Permit Conditions	\$550K-\$750K
Water System	\$480K
Total Construction Estimate (start Jan 2027)	\$7.6M-\$8.6M
Water System Completed to Date (2018 and 2023)	\$415k
Total Construction Estimate with water system (start Jan 2027)	\$8.0M-\$9.0M
Total Construction Estimate with Repairs to Boarder Area ^	\$9.5M-\$10.5M

* Separate from construction costs, the District has incurred \$755,000 in consultant costs to date (feasibility studies, designs, permit application preparation) and another \$450,000 would be needed to complete the Repair Project (final plans, as-builts, construction administration).

^ Based on ongoing deteriorating conditions of the boarder area, which have not been part of the Repair Project, the District expects the need to include these repairs with the Repair Project at an additional cost of +/- \$1.5 million.

Given the substantial increase in estimated Project Construction Costs from when the Board formally approved moving forward with the Repair Project in 2019, this item is returning to the Board to consider next steps for Stables.

Other Costs to Pursue the Repair Project and Maintain Horse Boarding and Public Programs

As part of Board deliberation on the next steps for the Stables, below is additional pertinent information regarding other associated costs and requirements to pursue the Repair Project and maintain ongoing horse boarding and public programs (e.g., lessons, trainings, camps). Based on experience in having an outside concessionaire operate the Stables under both the current and prior operators, the following has been made clear to the District:

1. The District must dedicate sufficient staff time, vehicles/equipment, and an annual services and supplies budget to address ongoing repair and maintenance needs for the Stables. It is evident that certain repairs and maintenance activities are beyond the capacity and financial resources of an outside operator. These include water line and water tank repairs, driveway and road repairs and maintenance, paddock replacements, roof and panel repairs of existing structures, and defensible space fire clearance. In contrast, based on the District's research on stables operations on public agency lands, an outside operator for a boarding program can reasonably be expected to handle the care and feeding of horses, the cleaning of stalls, manure management, hay deliveries, and maintenance of paddocks and arenas (i.e., bedding/footings, removing obstructions, filling ground squirrel holes, weeding, keeping gates operational).
2. The District will need to make modifications to the existing concessionaire agreement to retain a viable operator for the site. These considerations apply to Chaparral's ability to

continue operations and are expected to be necessary in order to attract interest from any qualified operator:

- Amend the lease to modify and reduce insurance requirements;
- Amend the maintenance and repair requirements to shift capital and facility maintenance and repairs to the District;
- Amend the lease to reduce age of camp participants and increase the number of camp participants per day to increase enrollment numbers;
- Allow leasing of individual horses;
- Allow a notable increase in boarding rates, upwards of +100% of boarding costs, and setting market trailer parking rates.

Estimate of annual District costs in 2024 dollars to conduct Stables repairs and maintenance actions include new staffing costs, vehicle/equipment costs, and annual budgets for services and supplies as detailed below:

Annual District Costs for Stables Repair and Maintenance		
Staff Position	Number of Positions	Cost (per year)
Maintenance Supervisor	0.5	\$92,077
Farm Maintenance Worker	1	\$127,679
Facilities Maintenance Specialist	0.25	\$36,953
<i>Sub-Total</i>	<i>1.75</i>	<i>\$256,709</i>
Vehicles and Machinery		
<i>F-150 Lighting and Tractor</i>	<i>Depreciated for annual cost</i>	\$16,600
<i>Sub-Total</i>		<i>\$273,309</i>
Annual Services and Supplies Budget		\$78,000
Total Annual Operating Costs		~\$350,000*

* Total annual cost is rounded to nearest \$1,000.

Due to the uncertainty of retaining a suitable operator for the boarding program, staff evaluated the feasibility and cost of the District operating the boarding directly. Under District operation, the District would take full responsibility for horse husbandry to maintain the horse boarding program. Below are the positions and costs anticipated if the District were to fully run the boarding operation:

District Costs – Boarding Plus Repair and Maintenance of the Site		
Staff Position	Number of Positions	Cost (per year)
Senior Property Management Specialist	1	\$223,875
Farm Maintenance Worker	2.5	\$319,198
Facilities Maintenance Specialist	0.25	\$36,953
<i>Sub-Total</i>	<i>3.75</i>	<i>\$580,026</i>
Vehicles and Machinery		
F-150 Lightning Truck and Tractor	<i>Depreciated for annual cost</i>	\$23,700
Manure Trailer		\$1,000

<i>Sub-Total</i>		\$604,726
Annual Services and Supplies Budget		\$78,000
<i>Sub-Total</i>		\$682,726
Feed & Care for Boarded Horses	72 Horses	\$349,200*
TOTAL		\$1,031,926

*Cost is reduced to \$242,500 for 50 horses.

If the District were to operate the horse boarding program, below are the anticipated boarding fee costs per horse to recoup District costs:

Boarder Fee Scenarios to Recoup District Costs		
Cost per horse with boarding only	@ 72 horses	~\$14,330 per year ~\$1,195 per month*
Cost per horse with boarding only	@ 50 horses	~\$18,505 per year ~\$1,540 per month
Cost per horse with boarding and programming (assumes ½ of the repair and maintenance costs)	@ 72 horses	~\$9,590 per year* ~\$800 per month*
Cost per horse with boarding and programming (assumes ½ of the repair and maintenance costs)	@ 50 horses	~\$11,677 per year ~\$973 per month
<p><i>*Unlikely to be feasible since it would require that programming horses be trailered in each day instead of kept on site given that all 72 allowed horses are public boarded horses and are not available for use by the programming concessionaire.</i></p>		

If the District were to operate the boarding program directly and opt to continue offering equestrian programs, the District would need to bring on an external vendor to provide programming horses and offer the public programs (e.g., trainings, lessons, camps). The actual lessons and trainings would be done by outside providers utilizing horses not owned by the District. The provision of programming would be dependent on finding a suitable provider. If no provider was interested in programming only, the District would not be able to provide any equestrian programs.

Alternative Options for the Stables

The following alternative options are presented for Board consideration in the deliberation on the next steps for the Stables.

Option A: Close the Stables

Remove majority of existing structures with potentially only the Tevis Barn remaining and provide site restoration (note: Tevis Barn is not deemed to be historic). No public vehicular access would be necessary. Public access would occur via trails that connect to the Alma Road Parking Area and to the future North Parking Area. This option requires the following considerations:

1. Stabilization of one structure (if desired) – Tevis Barn. Project scope and permit requirements are unknown at this time for this structure.
2. Cleanup and site restoration would cost approximately \$1 to \$2 million. Project scope and cost would be reduced significantly – upwards of +/- \$8.5 million.

Option B: Lower Intensity Horse Experiential Opportunity for the Public

A number of different iterations can be considered for a lower intensity horse experiential opportunity that is made available to the public. One concept can be to bring two to three horses onsite that are accessible for public viewing with limited interpretation and horse exposure programming, including talks regarding horse husbandry. No lessons or horse camps would be provided and no horse boarding would exist. This option requires the following considerations:

1. A Use Permit with the County may still be required for the reduced site improvements. Depending on County permitting requirements, the project may cost approximately \$3.0 million to \$3.5 million. The reduction in project scope may reduce costs by approximately \$7 million;
2. If improvements are still required for any of the three main barns to sustain the use, a Building Permit will likely be triggered, requiring fire access conditions and building code compliance. Use of the barn(s) will be dependent on whether the horses board onsite or whether they are transported in for the day based on the programming schedule.

Option C: Reduce Operation to Either Boarding or Programming Only

This option includes a good deal of uncertainty. The current and former Stables operators expressed that their operations are dependent on boarder fees to cover fixed cost of operating the Stables site and programming is necessary to generate revenue to support a viable operation. It is likely that a boarder only operation will fall to the District for operation due to lack of interest from a qualified operator. A programming only operator may need to be subsidized by the District to cover fixed costs.

Boarding Only

The boarding only operation would allow 72 onsite boarding paddocks but no public programming. This option requires consideration of the following:

1. Increasing boarding rates to current market rates (upwards of +100% in monthly fees);
2. Direct staff to secure the Use Permit through the County with a reduced Project scope. May result in a savings of approximately \$500,000 to 800,000, resulting in a total Repair Project of approximately \$9.7 million.
3. Elect to have the Stables operated by either:
 - a. A concessionaire under a new agreement with different terms (note: concessionaire interest in a boarding only operation is unknown at this time). Estimated annual District operating costs of ~\$350,000; or

District staff by hiring new positions and setting aside annual operating costs of \$1.03 million, with costs offset by boarder fees.

Programming Only

The programming only operation will allow activities such as lessons, horse camps, and other equestrian activities; no onsite horse boarding is included. This option would not be performed by the District. This option requires the following considerations:

1. Direct staff to secure the Use Permit through the County with a reduced Project scope. May result in a savings of approximately \$500,000 to \$800,000; Project savings would be from stabilizing and securing the Tevis barn rather than rehabilitation and reuse. The total Repair Project cost would be approximately \$8.7 million.
2. A new concessionaire agreement with different terms is required (note: concessionaire interest in programming only is unknown at this time). Estimated annual District operating costs of ~\$350,000.

A summary table of the Options compared to Costs and the 2017 Preserve Goals are shown below. See Attachment 2 for summary table with additional descriptions.

	Cost (Capital and Operation)	Minimizing Impact to Site and protection of Natural Resources	Maximize Public benefit by broadening public access and use of the facility	Develop a viable plan that is financially feasible for both a future tenant and the District
Option A - Close the Stables	●	●	◐	●
Option B - Lower Intensity Horse Experiential Opportunity for the Public	◐	◐	◑	◐
Option C – Reduce Operation to Either Boarding or Programming	◐	◑	Boarding only ◐ ----- Programming only ◑	◐
Repair Project: Maintains Existing Stables Operations for Boarding and Public Programming	○	◑	●	◑

- Strongest alignment with criteria
- ◑ Stronger alignment with criteria
- ◐ Medium alignment with criteria
- ◒ Weaker alignment with criteria
- Weakest alignment with criteria

District Trade-offs to Maintain Stables and/or Operate Boarding

FY25 and FY26 Impacts

- **Staffing**: In order to immediately manage the Stables, two Open Space Technicians (OST) would be assigned to assist Stables operations and a Maintenance Supervisor would be required to manage and coordinate with the property management team. Losing these staff members would severely impact scheduled and recurring maintenance work such as trail brushing, tractor brushing, fire road and trail maintenance, the Wildland Fire Resiliency Program, the Open Space Maintenance and Restoration Program, invasive species removal, and restoration and habitat improvement projects.
- **Site Security**: If the District takes on the boarding operation, the District would need to provide a night caretaker. This could be accomplished by securing a trailer and offering on-site housing to maintenance staff or finding a contractor to perform evening care and safety checks.
- **Training**: Newly assigned staff to the Stables would require specific Stables management training. If the District takes on the boarding program, the Farm Maintenance Worker (FMW) assigned to Deer Hollow Farms (DHF) in Rancho San Antonio would temporarily be reassigned to Stables to provide training on animal feeding and stall clean out. This will impact our committed support to DHF with the City of Mountain View and temporarily affect the level of service and experience our Rancho San Antonio visitors enjoy. The temporary vacancy at DHF will need to be backfilled with an OST or SOST, which will worsen the current position challenges and capacity constraints, further reducing the ability of staff to meet minimum District-wide service requirements for trail and infrastructure maintenance. Furthermore, the current FMW has no knowledge/experience caring for horses. Additional training from a qualified horse caretaker will be required to ensure the District is in compliance with State and County requirements regarding the care and feeding of horses.

Specific Project and Program Impacts

- **BCR Phase II**: Staffing levels required to complete the final scope of work to prepare Phase II Trails for a grand public opening in October 2024 will need to be re-evaluated. Reducing current staffing levels on this project to address Stables needs may delay the grand opening date if the trail work is not completed by the end of the 2024 construction season.
- **Wildland Fire Resiliency Program (WFRP)**: The reallocation of field staff resources will likely affect Resource Crews to address annual vegetation management work at the Stables. This adjustment would impact the scope of work outlined in the Los Gatos Creek Watershed Collaborative Forest Health Grant (LGCWCFHG) Project, which we are currently engaged in with local partners. Additionally, we are planning to begin introducing fire back into District preserves this fall with our first prescribed burn at Rancho De Guadalupe. If the Resource Crew capacity is redirected, the pretreatment

work required to prepare the site for fire may need to be postponed, requiring the District to wait until the following year, spring of 2025, before the prescribed fire component of the WFRP can be implemented.

- Kangaroo Rat Habitat Enhancement Project: Resource Crew staff reassigned to support scheduled vegetation maintenance work at the Stables may also be unable to complete all the work planned for the Kangaroo Rat Habitat Enhancement Project. As this project was a contributing factor that excited our partners in the LGCWCFHG to expand to a second phase of fuel treatment work that is beneficial for the Kangaroo Rat, delays to the habitat enhancement project may impact the District's ability to leverage future collaborations with the collective group.
- Invasive Species Management Projects: Redirecting staff would impact, and possibly postpone, invasive species management projects including the:
 - Biodiversity of Non-Native Grassland at Rancho San Antonio Preserve: this project utilizes mowing and seeding to promote biodiversity and restore native grasslands at a 50-acre non-native grassland area in the preserve. (The treatment protocol requires a three-year commitment of staff.)
 - Hendry's Creek Restoration Site: the current contract with Grassroots Ecology is set to expire this year and the Resource Crew is planned to assume management of this site. If redirected, a new contract with Grassroots Ecology would need to be prepared to continue maintenance and monitoring of restoration efforts at this location.

FISCAL IMPACT

At the April 2019 meeting, the Board selected the Repair Project option with estimated construction cost of between \$4M and \$4.4M. At the April 2020 meeting, the Board approved allocation of \$1.223M of available interest income from Measure AA Bond Proceeds to close the known funding gap to implement the Repair Project. Based on new refined costs estimates, the new Repair Project construction cost is anticipated to be between \$9.5 and \$10.5 million due primarily to escalation from 2019 dollars and the additional conditions and components required through the permitting process.

The FY24 adopted budget includes \$138,105 for the Bear Creek Stables Project MAA21-004. The FY25 proposed budget should be sufficient to move forward with any option. Funds for future year costs will be updated to reflect whichever decision is made by the Board and recommended in future fiscal year budgets as a part of the annual Budget and Action Plan process.

MAA21-004 - Bear Creek Stables Project	Prior Year Actuals	FY24 Adopted	FY25 Projected	FY26 Projected	TOTAL
District Funded (Fund 30):	\$893,721	\$138,105	\$227,865	\$2,710,998	\$3,970,689
Fund 30 Interest Income:	\$0	\$0		\$1,223,000	\$1,223,000
District Funded (Fund 40):	\$0	\$0		\$527,000	\$527,000
Total Budget:	\$893,721	\$138,105	\$227,865	\$4,460,998	\$5,720,689*
Spent-to-Date (as of 05/09/24):	(\$893,721)	(\$26,659)	\$0	\$0	(\$920,380)
Encumbrances:	\$0	(\$82,970)	\$0	\$0	(\$82,970)
Current Budget Remaining:	\$0	\$28,476	\$227,865	\$4,460,998	\$4,717,339

*Future projected costs based on proposed FY25 Budget and Action Plan which is going to the full Board for approval in June 2024. Future fiscal year projections are preliminary and will be revisited as part of the annual Budget and Action Plan process.

A cost comparison table for the options moving forward as previously discussed is included below.

Bear Creek Stables Options (2024, \$ in Millions)	Construction Cost		Annual Operating Cost *
	Low Range	High Range	
Option A: Close the Stables	\$1.0	\$2.0	\$0.03**
Option B: Lower Intensity Horse Experiential Opportunity	\$3.0	\$3.5	\$0.12**
Option C: Reduce Operation to either Boarding or Programming	\$8.7	\$9.7	\$0.35^
Repair Project	\$9.5	\$10.5	\$0.35^

*Annual cost assumes concessionaire responsible for boarding and programming

** Annual cost for first 10 years only

^ Annual cost for boarding or programming by Concessionaire. Boarding by District projected at \$1.03M per year.

The following table outlines the Measure AA (MAA) Portfolio 21 Bear Creek Redwoods — Public Recreation and Interpretive Projects allocation, costs-to-date, projected future project expenditures and projected portfolio balance remaining. There is currently a positive portfolio balance of \$3.5M projected if Option A is chosen, and a negative portfolio balance of about \$6.0M projected if the Repair Project option is chosen. Additional funding to complete the Bear Creek Stables project will need to be covered by General Fund monies.

MAA21 Bear Creek Redwoods — Public Recreation and Interpretive Projects Portfolio Allocation:	\$17,478,000
Grant Income (through FY27):	\$5,061,002
Interest Income Allocation:	\$2,709,000*
Fund 40 Allocation:	\$977,000
Total Portfolio Allocation:	\$26,225,002
Life-to-Date Spent (as of 05/09/24):	(18,745,170)
Encumbrances:	(431,205)
Remaining FY24 Project Budgets:	(813,259)

Future MAA21 project costs (low range to high range option projection):	(2,767,237) to (12,267,237)^
Total Portfolio Expenditures:	(\$22,756,872) to (\$32,256,872)
Portfolio Balance Remaining (Proposed):	\$3,468,130 to (\$6,031,870)

**Includes the Board-approved allocation of \$1.223M in available interest income on Measure AA Bond Proceeds for the Bear Creek Stables project and \$1.486M for Phase II Trail Improvement project.
^Future projected costs based on proposed FY25 Budget and Action Plan which is going to the full Board for approval in June 2024. Also added to this figure is 1M for the low range option and 10.5M for the high range option. Future fiscal year projections are preliminary and will be revisited as part of the annual Budget and Action Plan process.*

The following table outlines the Measure AA Portfolio 21 allocation, projected life of project expenditures and projected portfolio balance remaining.

MAA21 Bear Creek Redwoods — Public Recreation and Interpretive Projects Portfolio Allocation:	\$17,478,000
Grant Income (through FY27):	\$5,061,002
Interest Income Allocation:	\$2,709,000
Fund 40 Allocation:	\$977,000
Total Portfolio Allocation:	\$26,225,002
Projected Project Expenditures (life of project):	
21-001 Moody Gulch Fence & Gate Improvements	(\$847)
21-004 Bear Creek Stables Project (Low Range to High Range Option)	(\$2,031,825) to (\$11,531,825)
21-005 Bear Creek Redwoods Public Access	(\$5,548,003)
21-006 Bear Creek Redwoods - Alma College Cultural Landscape Rehabilitation	(\$5,775,926)
21-007 Bear Creek Redwoods Preserve Plan Invasive Weed Treatment	(\$2,056,410)
21-008 Bear Creek Redwoods Ponds Restoration and Water Rights	(\$681,517)
21-009 Bear Creek Redwoods Webb Creek Bridge	(\$487,492)
21-010 Bear Creek Redwoods Landfill Characterization and Remediation	(\$517,444)
21-011 Phase II Trail Improvements, Bear Creek Redwoods OSP	(\$5,566,493)
21-012 Bear Creek Redwood Tree Restoration	(\$90,915)
Total Portfolio Expenditures:	(\$22,756,872) to (\$32,256,872)
Portfolio Balance Remaining (Proposed):	\$3,468,130 to (\$6,031,870)

PRIOR BOARD AND COMMITTEE REVIEW

Since the approval of the Preserve Plan, this Project previously came before the full Board at the following public meetings:

- **December 15, 1999:** The Board adopted an amendment to the preliminary use and management plan for Bear Creek Redwoods Open Space Preserve to continue horse boarding facility use and authorized the General Manager to execute a stables rental agreement. ([R-99-159](#), [meeting minutes](#))
- **October 14, 2015:** The Board approved the assignment and amendment of the Bear Creek Stables Rental Agreement from Glenda Smith to Pamela Ashford. ([R-15-146](#), [meeting minutes](#))
- **January 25, 2017:** The Board adopted a resolution certifying the Final Environmental Impact Report, adopting the Findings of Fact and Statement of Overriding Considerations, approving a Mitigation Monitoring and Reporting Plan, and approving the Bear Creek Redwoods Preserve Plan. ([R-17-15](#), [meeting minutes](#))
- **April 25, 2019:** The Board considered various project options for the Stables and directed staff to move forward with Deferred Maintenance Repairs at the Stables in the near-term and the Preserve Plan Site Design as a long-term solution. ([R-19-53](#), [meeting minutes](#))
- **September 25, 2019:** The Board received an FYI memorandum on the revised scope and fee for the design consultant, John Northmore Roberts & Associates. ([FYI Memo](#))
- **October 9, 2019:** The Board directed the General Manager to refrain from pursuing a public-private fundraising endeavor and focus on implementing Deferred Maintenance Repairs. ([R-19-131](#), [meeting minutes](#))
- **April 8, 2020:** The Board directed the General Manager to allocate \$1.223M of the available Interest on Measure AA Proceeds to close the known funding gap to implement the Stables Project. ([R-20-34](#), [meeting minutes](#))
- **June 09, 2021:** The Board received an update on the Bear Creek Stables Project, including its legal non-conforming permitting status and challenges therein, and affirmed the Use Permit permitting approach. ([R-21-74](#), [meeting minutes](#))
- **July 14, 2021:** The Board approved operational requirements, concessionaire selection criteria, and agreement terms for a new concessionaire at Bear Creek Stables. ([R-21-98](#), [meeting minutes](#))
- **August 24, 2022:** The Board authorized the General Manager to enter into a Concessionaire Agreement for Bear Creek Stables with Chaparral Country Corporation. ([R-22-99](#), [meeting minutes](#))

PUBLIC NOTICE

Public notice was provided as required by the Brown Act. Bear Creek Redwoods interested parties plus the Stables boarders were notified of the public meeting. Additionally, a notice was also posted at the Stables location.

CEQA COMPLIANCE

The Bear Creek Redwoods Preserve Plan Environmental Impact Report (EIR) analyzed the Stables Site Plan. The Board certified the Final EIR on January 25, 2017. The EIR evaluated project elements associated with the repair plan. Implementation of the repair plan would not result in new significant effects or a substantial increase in the severity of previously identified significant effects; therefore, no additional environmental review is necessary.

Pending Board direction, staff would prepare a revised Use Permit application if needed that requires documentation of the prior CEQA compliance obtained for the Preserve Plan, which analyzed the Project. No additional environmental review is required.

NEXT STEPS

If the Board supports Option A to close the stables, staff will proceed with design development, permitting and implementation for demolition and site restoration.

If the Board supports Option B staff will proceed with design development, permitting and implementation for demolition and site improvements to support the Lower Intensity Horse Experiential Opportunity. Staff would explore partnership opportunities for retaining 2 to 3 horses on site available for public viewing. Depending on the staffing needs after a plan is developed, additional staffing may be requested.

If the Board supports Options C, staff will develop a new project scope, budget and timeline. Additionally, staff would prepare a new agreement to retain an operator for the modified Stables operation. The General Manager will request additional staff to meet the Stables repair and maintenance needs. Alternatively, the General Manager would request additional increases in staffing and/or redirect existing staff resources to manage the Stables if the District is unable to secure an operator.

If the Board decides to continue with the Repair Project to maintain existing Stables operations for boarding and public programming, staff will proceed with design development, permitting and implementation of the Capital Maintenance and Repair Plan. The General Manager will request additional staff to meet the Stables repair and maintenance needs. Additionally, staff will pursue a modification of concessionaire agreement terms if the Board elects to have a concessionaire continue operating the Stables. Alternatively, the General Manager would request additional staffing or redirect existing staff resources to manage the Stables if the District is unable to secure an operator.

Attachments:

1. Capital Repairs and Maintenance Project and Stables Operations Background Summary
2. Stables Options Comparison
3. Capital Repair and Maintenance Project Overview Site Plan

Responsible Department Head / Prepared by / Staff Contact:
Jason Lin, Engineering & Construction Manager
Brandon Stewart, Land & Facilities Manager

Capital Repairs and Maintenance Project and Stables Operations Background Summary

On January 25, 2017, the Board approved the Bear Creek Redwoods Preserve Plan (Preserve Plan). The Preserve Plan designates the Stables for continued equestrian use and identifies numerous actions for the Stables, including infrastructure improvements, hillside erosion control and revegetation, and public access enhancements. Cost estimates for the Bear Creek Stables Site Design included in the Preserve Plan increased significantly during design development and permitting consultation due to the need for extensive site engineering. Since that time, the Board has received several updates and adjusted the Project scope and permitting process as follows:

April 25, 2019 (R-19-53): The Board considered five Project options (Preserve Plan Site Plan, Maintenance and Repairs, Close Stables, Sell or Lease, Relocate) and directed staff to move forward with the Capital Maintenance and Repair Project to maintain current equestrian programming under the legal, non-conforming status and implement key repairs and incorporate Americans with Disabilities Act (ADA) requirements. The estimated cost of repairs at that time was \$4M - \$4.4M.

March 25, 2020 (R-20-34): The Board received an update on the Stables Project, plan development, permitting requirements, schedule, and cost estimates. At this meeting the Board allocated an additional \$1.223M of interest income from Measure AA bond proceeds to close the anticipated funding gap for the Project.

June 9, 2021 (R-21-74): The Board received an update on the Stables Project and major challenges in securing County permits for the repair work given the property's legal non-conforming status that would:

- Set annual limits to the amount of repair work that could be made on existing structures.
- Prohibit the relocation of paddocks (effectively reducing the number of boarded horses) following the removal of select paddocks to accommodate a new septic leach field.
- Prohibit the issuance of a temporary construction operation permit.
- Add project costs to address permit conditions and building code upgrades related to the unpermitted structures.

Staff subsequently presented the option of first securing a Use Permit for the Stables to formalize the use and facilitate County building permits for the repair work. Through discussions with County staff, the District's understanding of key advantages and disadvantages are shown below:

Advantages of Applying for a Use Permit

- Provides a holistic approach to permitting a suite of improvements and activities.
- Provides an opportunity to work with the County to define phased improvements and corresponding permit conditions.
- Brings the Stables in compliance with the County's Zoning Ordinance and therefore eliminates Zoning Ordinance limitations associated with non-conforming uses.
- Supports a phased approach to implement site improvements and repairs. Phased work would be described in the Conditions of Approval.

- Provides a mechanism to complete minor routine repairs.
- Allows for future expansion of public uses; during future lease negotiations, tenants would be able to propose expanded programming as part of a sustainable business model.
- Due to past closures of equestrian facilities within the County, and the Board of Supervisors’ interest in maintaining the remaining boarding facilities, the County would work closely with the District in developing permit conditions that meet District goals for the Stables site plan.

Disadvantages of Applying for a Use Permit

- The Use Permit process opens up the entire operations of the Stables to public review, additional comments, and critique submitted to the County as they review the Use Permit application.
- Requires discretionary approval from the County Planning Commission with an uncertainty of new requirements and/or restrictions that do not currently exist under the legal non-conforming use status; some of these new requirements and/or restrictions may be imposed in response to public comments about the operations.
- May require additional time and consultant services to address comments from the County and/or public, potentially delaying the Project schedule and increasing costs. Delays and additional costs would also result if the Use Permit process triggered the need for new expanded site work such as upgrades to the driveway and/or parking.

Based on the information presented, the Board affirmed the Use Permit approach to facilitate County permit approvals for the repair work.

March 22, 2023 (R-23-33): The Board received an update on the Use Permit process that had been intended to facilitate County permit approvals. Staff presented on Use Permit challenges, most notably the Fire Marshal conditions, which pose significant budget implications. The Board was presented with the option to provide baseline fire suppression system or propose and negotiate alternate means and methods through County’s AMMR process. Below is a summary of the baseline option compared to the AMMR option:

	Baseline Option		AMMR Option
Driveway Width	20’ wide + 2’ shoulders = 24’		16’ wide min. up to 20’ wide
Breezeway Barn	Sprinklers	Bldg. permit	Demolish & replace with one new barn equivalent in size and amenities
Hay Barn	Sprinklers	Bldg. permit	
Water Tank	33,000 gallon + booster pump		Minimum 15,000-gallon
Cost Increase	\$770,000		\$440,000

The Board directed staff to proceed with the AMMR option.

Stables Operations

In December 1999, the Board approved a month-to-month Stables lease with Glenda and Paul Smith, the operators at the time of District acquisition of the property ([R-99-159](#)). In 2015, when Glenda Smith decided to relocate to Washington State, District staff met with Ms. Smith to discuss interim management options. She requested assigning the Stables lease to Pamela Ashford on an interim basis to maintain status quo operations while the Bear Creek Stables Site Plan (Plan) was completed. The Board approved and assigned the Stables lease to Pamela Ashford in October 2015 ([R-15-146](#)). Pamela Ashford continued to operate the site on a month-to-month lease.

July 14, 2021 ([R-21-98](#)): The Board received a presentation on the Bear Creek Stables process for selecting a long-term stables concessionaire. Staff presented the Bear Creek Stables operational requirements and concessionaire selection criteria. The Board reviewed the proposed criteria and selected nine objectives for future operations at Bear Creek Stables. Additionally, the Board reviewed and approved the proposed concessionaire evaluation criteria.

August 24, 2022 ([R-22-99](#)): Following an open and competitive Request for Proposals (RFP) process to select a new stables operator, the Board authorized the General Manager to enter into a concessionaire agreement for Bear Creek Stables with Chaparral Country Corporation for a preliminary 2-year term with options to extend for two additional 5-year terms, and a fee structure of: (1) 5% of gross receipts lease payment and (2) 5% of gross receipts payment held in a maintenance and improvement fund.

Since the award of a new concessionaire, the District has spent considerable staff time and resources coordinating with the previous and current operators to ensure continued boarding operations and public programming at the Stables. Below is a summary of repairs and ongoing maintenance that has occurred to date.

Stables Repairs and Maintenance Completed by the District

- **Water Line Repairs** – staff had performed multiple repairs of the mainline pipe supplying water to the stables from an existing spring due to breaks related to winter storm damage and deteriorated steel pipes. Given the deteriorated condition of the water line and its inability to handle water pressure, this line was ultimately abandoned and replaced with a connection to San Jose Water.
- **Water Deliveries** – following abandonment of the spring, water was required to be delivered to the stables until the San Jose Water connection stretching from the northeast trail head was completed. These regular deliveries required staff working on weekends and contractor delivery costs.
- **Septic Pumping and Garbage Service** – the District pays for a portable ADA restroom and has paid for multiple 40-yard dumpsters for trash and debris removal of material left by the former operator.
- **Vegetation Management** – staff annually perform defensible space vegetation clearing around the stables, removing ladder fuels, maintaining shaded fuel clearance, and reducing brush density and brush encroachment.

- **Demolition and Replacement of Paddocks** - staff have removed 18 paddocks that were degraded to the point of not being appropriate for horse use. These paddocks are being replaced in phases.
- **Driveway and Ground Preparation** – the District has been maintaining the driveway, working with contractors and District field crews to pulverize existing sections of failing asphalt and regrade sections of the road leading into the stables.
- **Transition from Pam Ashford to Chaparral** – the District was required to replace panels to reestablish the arena, water troughs, and other infrastructure that was removed when the prior operator exited the site.
- **Staff Administration** – the District conducts regular site visits and meetings with Chaparral to review elements of the concessionaire agreement.














Each of the following costs are based upon ongoing work orders, over the last 13 months, tracked through Cityworks:





Category	Amount
Water Line Repairs	\$204,747.27
Water Deliveries	\$49,640
Septic Pumping	\$9,628.60
Garbage Service	\$9,709.23
Vegetation Management and Demolition	\$81,422.12
Driveway & Ground Preparation	\$34,322.88
Transition from Pam Ashford to Chaparral	\$19,250.31
Staff Administration	\$11,905.59
Total	\$420,626.00

###

STABLES OPTIONS COMPARISON


ATTACHMENT 2

	Cost (Capital and Operational) *	Minimizing Impact to Site and protection of Natural Resources	Maximize Public benefit by broadening public access and use of the facility	Develop a viable plan that is financially feasible for both a future tenant and the District
Option A - Close the Stables				
	Least costly to implement. Will require minimal maintenance.	Removes majority of existing structures (with potentially only the Tevis Barn remaining) and restores site to natural environment. No major tree removal is required. Ongoing natural resource impacts and disturbances related to regular stables maintenance, use, and defensible space clearance is avoided.	Public access would be consistent with general Preserve and trail access. A quarter moon is shown to indicate that the site can be made accessible to the public via the internal trail system. Rather than provide an equestrian experience, the site would expand upon the open space preserve experience.	Eliminates Repair Project Costs and future costs related to ongoing repairs and maintenance of the stables, as well as staffing resources that would otherwise need to be allocated to address Stables operating issues and public inquiries and concerns.
Option B - Lower Intensity Horse Experiential Opportunity for the Public				
	Marginally costly to implement and maintain.	This option includes minimal site grading and rocking to existing road and public access area, reduced structure stabilization, reduced utilities upgrades, and minimal programming amenities. No major tree removal is anticipated.	Experiential horse opportunity provides a different equestrian experience, with stables and horse viewing only. No boarding or programming is included.	Project scope significantly reduces up front capital costs and ongoing maintenance and management costs.
Option C – Reduce Operation to Either Boarding or Programming			Boarding only 	
	Costly to implement and maintain. Minimal cost savings from full Repair Project.	This option includes mitigation of existing conditions and equestrian uses, such as site restoration, grading and drainage, stormwater treatment, and septic system replacement. Construction would result in negative site impacts due to	Programming only 	
Boarding provides minimal public benefit, limited to a specific group of individuals. Equestrian programming provides a greater public benefit to a larger and broader number of individuals.			Boarding fees would need to increase +100%, and still, it is unclear whether a boarding only option will be financially viable for a commercial operator. If the District assumes operation, similar increases in boarding fees are necessary to recoup costs. New dedicated staff will be required to manage boarding, along with an	

		extensive site grading, asphalt paving, retaining walls, utilities, and may require removal of over 30 trees in the riparian corridor to address Fire Department Access Road requirements.		annual services and supplies budget for repairs and maintenance. A programming only option will require additional District support staff and an annual services and supplies budget to conduct repairs and maintenance of the site and address ongoing public inquiries and concerns.
Repair Project: Maintains Existing Stables Operations for Boarding and Public Programming				
	Most costly option to implement and maintain.	This option includes mitigation of existing conditions and equestrian uses, such as site restoration, grading and drainage, stormwater treatment, and septic system replacement. Construction would result in negative site impacts due to extensive site grading, asphalt paving, retaining walls, utilities, and may require removal of over 30 trees in the riparian corridor to address Fire Department Access Road requirements.	Implementation of the Repair Project would allow for continued boarding, expanded equestrian programming and general public access to the site, maximizing public benefit.	Requires substantial amendments to the concessionaire agreement, including increasing boarder fees by ~+100%, insurance requirement adjustments, horse leasing, and an easing of programming restrictions to improve viability of the operation. Also requires additional District support staff and an annual services and supplies budget to conduct annual repairs and maintenance of the site and address ongoing public inquiries and concerns.

*Refer to Board report for full cost breakdown.

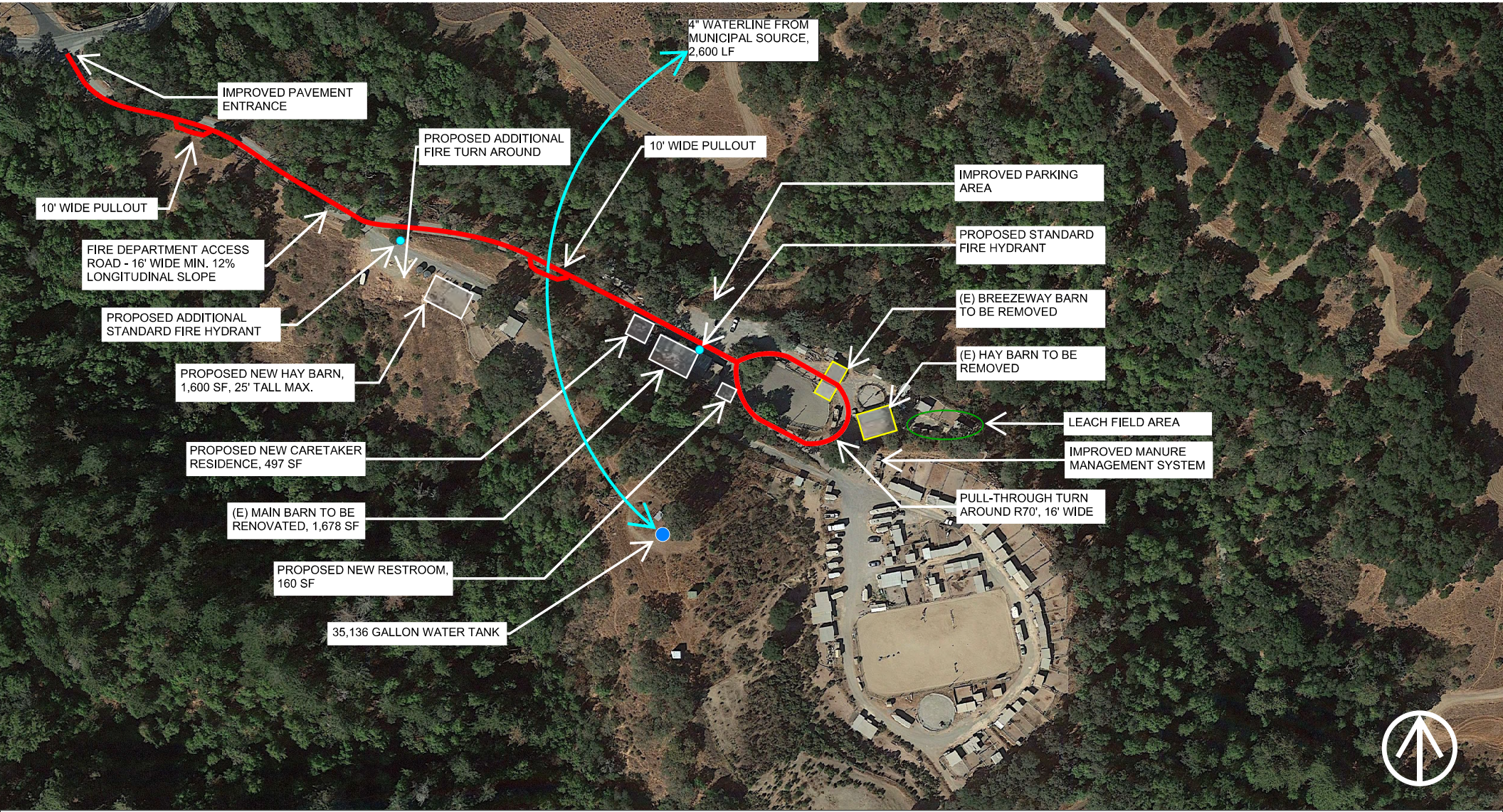
 Strongest alignment with criteria

 Stronger alignment with criteria

 Medium alignment with criteria

 Weaker alignment with criteria

 Weakest alignment with criteria



ATTACHMENT 3: REPAIR PROJECT OVERVIEW SITE PLAN
BEAR CREEK STABLES
NOT TO SCALE

THIS PLAN INTENDS TO PRESENT A SCHEMATIC PROJECT OVERVIEW ONLY. PROGRAM ELEMENTS NOT SHOWN INCLUDE, BUT NOT LIMITED TO, ADA IMPROVEMENTS TO PARKING, PATH OF TRAVEL, AND HORSE MOUNTING AREA.

AD HOC COMMITTEE FORMATION AND WORKING GROUP PROCESS

On May 14, 2024, after deliberating on various options for the Bear Creek Stables site, the Board of Directors (Board) decided to form an Ad Hoc Committee to work with community members in developing potential additional option(s) and return to the full Board in approximately four months. The three-member Ad Hoc Committee has consisted of Director Gleason (as Chair), Director Holman, and Director Riffle. The Ad Hoc Committee held its first meeting on June 4, 2024, at which time they formed three working groups, each led by one Ad Hoc member and focusing on one of the following three topic areas:

- Operations & Programming
- Site Design, Architecture & Engineering
- Fundraising & Partnership

Consistent with Board direction, community members were allowed to self-select to participate in one of the working groups. On June 4, 2024, Ad Hoc Committee also approved the Committee's purpose and charge as follows:

- Work with community members with experience in areas identified by the Board, including stables operation, programming, maintenance, architecture, landscape architecture, engineering, equine community programming, and fundraising to explore and develop potential additional options for long-term stables operation.
- Evaluate and present options for full Board consideration consistent with the Board approved Bear Creek Stables Goals as outlined in the 2017 Bear Creek Redwoods Preserve Plan:
 - Emphasize the protection of the site's natural resources;
 - Maximize public benefits by broadening public access and use of the facility, and;
 - Develop a viable plan that is financially feasible for both a tenant and District.
- Work with elected officials to support the stables.

The Ad Hoc Committee officially kicked off the working group process at its second meeting on June 11, 2024, reviewing the community participation process, including working group structure, goals, expectations, ground rules and instructions on how to join a working group. Community members interested in joining the working groups were able to sign up within one week after the June 11 meeting. At the conclusion of the sign-up period, 18 individuals signed up for the Operations and Programming group, 10 for the Site Design, Engineering and Architecture group and 8 for the Fundraising and Partnership group. Community members brought forth a wide range of expertise, including architecture, engineering, management, equine training, public programs, and philanthropy.

From June to November, each working group researched their focus area and developed recommendations. During this period, the Ad Hoc Committee held eleven (11) publicly noticed meetings (including 6 hybrid meetings) at the District administrative office for information sharing, progress updates and collaboration among the working groups. Additionally, individual

working groups visited the stables site with staff and met with staff as needed as they worked to research and develop potential options for the stables. The Committee and working groups ultimately reconciled differences and developed a joint set of recommendations that have been assembled into one proposed use and management option. The Ad Hoc Committee Option proposes to implement capital improvements in phases to support horse boarding and public programs within a non-profit management model that would manage, operate, and fundraise for ongoing operations and future site improvements. The Ad Hoc Committee recommendations are detailed in the November 20, 2024 Board report and in Attachments 4 and 5 of the same report.

###

BEAR CREEK STABLES AD HOC COMMITTEE SUMMARY REPORT AND RECOMMENDATIONS

Director Craig Gleason (Chair)

Director Karen Holman

Director Curt Riffle

Focused Working Groups

Operations and Programming
Site Design, Architecture, and Engineering
Fundraising and Partnerships

November 4, 2024

TABLE OF CONTENTS

FOCUSED WORKING GROUPS AND MEMBERS 2

A SHARED VISION FOR BEAR CREEK STABLES 3

KEY RECOMMENDATIONS 4

ROAD MAP 6

PHASING 7

MANAGEMENT APPROACH 8

PROGRAMMING 9

SITE 12

FINANCING THE BEAR CREEK STABLES PLAN 18

CONCLUSION 21

ATTACHMENTS

- ATTACHMENT A: OPERATIONS AND PROGRAMMING WORKING GROUP REPORT
- ATTACHMENT B: SITE DESIGN, ARCHITECTURE, AND ENGINEERING WORKING GROUP REPORT
- ATTACHMENT C: FUNDRAISING AND PARTNERSHIPS WORKING GROUP REPORT

FOCUSED WORKING GROUPS AND MEMBERS

BEAR CREEK STABLES AD HOC COMMITTEE

Operations and Programming - Director Craig Gleason

Mike Buncic, Stacey Douglas, Robert Filkowski, Cathy Gromer,
Ron Gromer, Diane Hunter, Peggy Kauffman, Toni Kent, Ayako Lainez,
Sue Landaiche, Clint Meek, Rick Parfitt, Cristin Reichmuth,
Jenny Whitman, Manal Zayed

Site Design, Architecture, and Engineering - Director Karen Holman

Bob Alexander, Mike Bushue, Zoya Girshfeld, Kent Knop,
Melany Moore, Scott Simpson, Pamela Warren

Fundraising and Partnerships - Director Curt Riffle

Anne Black, Nancy Cole, Marcie Colonna, Suzanne Cornelius, Petra Wengler

A SHARED VISION FOR BEAR CREEK STABLES: PRESERVING HISTORY, PLANNING FOR THE FUTURE

Nestled within the redwood forests of the Santa Cruz Mountains, Bear Creek Stables (BCS) tells a quiet story of history, resilience, and community spirit. From the time Dr. Harry Tevis stabled his prized Tennessee walking horses here over a century ago to today's efforts to shape a new chapter, BCS stands as more than just a physical space—it reflects a heritage of stewardship, shared responsibility, and connection among people, animals, and nature. The view from nearby trails, framed by the oak woodlands, underscores this natural connection and the significance of the surrounding preserve.

Embracing this legacy, the Bear Creek Stables Ad Hoc Committee (BCS AHC) has crafted a plan that goes beyond near-term repairs. It offers a clear, actionable approach to reinvigorate the site and expand public use, aligning with Midpen's mission, the preserve plan goals for BCS, and the community's vision. This thoughtful response to past challenges and future possibilities presents a multi-phase approach, matching repairs and improvements with expanded programs and fundraising. By reducing capital burdens and utilizing a new governance model—led by a nonprofit board to ease staff oversight—the plan addresses key concerns while laying a foundation for long-term success. Shifting away from the previous for-profit model, it emphasizes community value and enhances the capacity to serve a wide audience, including traditionally underserved groups, through immersive, nature-based programs that highlight the unique qualities of BCS.

Built on a collaborative process and informed by decades of expertise in engineering, architecture, site planning, equine care, project management, and philanthropy, the plan embodies a collective commitment to sustainable design, environmental education, and public use. Like nearby Alma College, BCS is poised to become a meaningful educational and interpretive resource for the community, preserving cultural character and telling the story of past landowners while connecting more people to the land. Historic preservation consultant Chris Ver Planck notes that the stable complex—comprising the 1916 stable, an adjoining cottage, and a 1917 foreman's house—is among the last examples of its kind in the Santa Cruz Mountains, a rare remnant of a disappearing way of life. This Craftsman-style stable, built by local contractor Harley Hoerler, provides a unique historical asset that encapsulates an era otherwise largely lost.

At its heart, the plan reimagines BCS as a gateway between history and modern stewardship, where horses continue to play a pivotal role—introducing people to the land and fostering deeper connections to the environment. The appeal of horses will entice young people to unplug from social media, enjoy the outdoors, and become the volunteers of tomorrow. Rooted in respect for the past but crafted for the future, the plan ensures that BCS remains a place for community, nature, and learning for generations to come.

KEY RECOMMENDATIONS

On May 14, 2024, Midpen staff presented the Board of Directors with several alternatives regarding BCS. The Board voted to establish an Ad Hoc Committee to work with community members experienced in areas identified by the Board to explore and develop potential additional options for the long-term operation of BCS.

Guided by the Bear Creek Redwoods Preserve Plan goals for BCS—emphasize the protection of the site’s natural resources, maximize public benefits by broadening public access and use of the facility, develop a viable plan that is financially feasible for both a tenant and Midpen—the Bear Creek Stables Ad Hoc Committee (BCS AHC) is organized into three working groups: Operations & Programming (OPWG), Site Design, Architecture, and Engineering (SDAE), and Fundraising & Partnership (FPWG). The committee consists of Director Gleason (as Chair), Director Holman, and Director Riffle, each leading one of the working groups.

More than 30 community members with a wide range of expertise—including architecture, engineering, management, equine training, public programs, and philanthropy—have contributed to these committees over a 5-month period. Each group researched their area and provided recommendations. The BCS AHC then met to reconcile differences and develop joint recommendations.

The following key recommendations meet these goals by expanding public access, fostering community-centered programming, implementing a phased approach, adopting a nonprofit management model, and prioritizing targeted improvements and fundraising. This approach outlines practical steps to transform BCS into a unique Midpen community resource

Enable expanded public access through programs that align with Midpen’s mission and BCS goals: Serve large and diverse communities with programming that leverages the stables and horses as well as the unique setting in an open space preserve.

Implement a phased approach to site improvements, programming, and fundraising: Early programming will focus on smaller, community-based activities, expanding as site improvements are completed. This phased approach allows for manageable growth. Midpen would be primarily responsible for phase 0 and phase 1 capital costs. Further capital improvements in Phase 2 will be contingent on any future allocated funding and fundraising.

Adopt a nonprofit management model to operate BCS and deliver programs: An agreement with a nonprofit partner could prioritize public service and sustainability over commercial profit, ensuring that programs align with Midpen’s mission while establishing reliable management with clearly defined roles and responsibilities for operating the stables.

Make key physical improvements to improve site functioning and programming:

1. Use the upper road for the main two-lane entry/exit path and retain the lower road as a single lane restricted to staff and ADA access. Rationale: Eliminates most vehicle traffic into the lower programming area, provides ADA accessibility, and greatly enhances public safety.
2. Locate the public parking area at the intersection of the upper and lower roads, commonly called the “Y.” Rationale: Saves cost and improves traffic flow.
3. Install 2-3 small prefab barns for hay storage. Rationale: Reduces costs, improves operational efficiency, and reduces waste of stored feed.
4. Use gravel surfaces on areas traveled by horses wherever possible. Rationale: Necessary for equine and rider safety.
5. Consider authorizing the nonprofit operator to contract for and manage some capital projects. Rationale: Reduces cost.
6. Consider the option to locate the Caretaker cottage and ADA-compliant restrooms/parking on the north side of the lower arena. Rationale: Creates more programming areas, reduces cost, and improves accessibility. See also the last item in the recommendations section below.

The SDAE and Midpen staff have worked closely and collaboratively to identify site improvements that will reduce cost and improve site functionality for programming. Midpen staff will present a site option that would adopt the phasing approach, parking area modification, hay barn recommendation, and numerous other points of agreement. Only items 1, 5, and 6 from the site list above differ substantially in the staff option. For this option, we recommend applying the same approaches for phasing, management, and programming contained in the key recommendations.

Use nonprofit fundraising including grants, fees, individual and corporate donations, events, etc. to complement Midpen funds to enable a wide variety of high value programs, add key programming facilities, and highlight and restore key historic aspects of the site, in particular the Tevis Barn.

Recommend that Midpen:

- Partner with the nonprofit to develop a set of milestones, initial fundraising goals, and steps toward the transfer of management, with clear objectives to be achieved before the majority of Midpen’s phase 1 expenditures.
- Partner with the nonprofit to develop an operating contract with clear roles and responsibilities for each party.
- Hire staff, similar to Deer Hollow Farm, to address maintenance at the stables and to avoid unplanned load on Midpen staff.
- Work with BCS AHC SDAE and OPWG members to resolve the remaining site improvement options.

ROAD MAP

To transform BCS into a hub for community interaction, education, and environmental stewardship—fostering a deeper connection to the natural world—the BCS AHC presents a clear and actionable plan aligned with Midpen's mission and the three core goals of the Bear Creek Redwoods Preserve Plan.

The structured approach proposed in the plan addresses Midpen's primary concerns regarding BCS:

- **Capital costs:** This plan eases Midpen's financial burden through phasing, fundraising, and efficient site improvements.
- **Staff time and resources:** The nonprofit model, supported by both paid staff and volunteers, enables efficient operations, reducing the workload on Midpen staff through collaborative partnerships.

The BCS AHC's roadmap is anchored by three primary outcomes:

1. **Effective management:** Establishing effective oversight through a dedicated nonprofit governing board, with clear delineation of nonprofit and Midpen responsibilities.
2. **Financial sustainability:** Ensuring long-term financial viability by managing operating costs, addressing capital costs, and increasing outside funding through fundraising.
3. **Functional site:** Supporting safe operations and programs while promoting sustainable growth aligned with long-term goals.

These outcomes are implemented through the following supporting approaches:

- **Phasing:** Coordinating management, programs, fundraising, and site improvements along a feasible timeline to address manageable expenses and sustainable growth.
- **Management model:** Aligning BCS management with Midpen's mission through a nonprofit partnership, establishing clear responsibilities to reduce staff burden and foster community engagement.
- **Programs:** Offering enriching public outreach that blends nature, education, and equine experiences to attract a diverse population.
- **Site improvements:** Proposing cost-effective enhancements to BCS facilities to maximize public benefit while reducing costs.
- **Financial:** Supporting programming and offsetting some capital costs to Midpen through grants, donations, and community partnerships

The programming, management, and financing recommendations outlined in this plan are designed to be flexible and adaptable to ensure successful implementation, regardless of the final site configuration chosen.

The following summary outlines the information used to develop the BCS AHC recommendations. Additional details can be found in the individual working group reports included as Attachments A, B, and C.

PHASING

Phasing is integral to the successful implementation of this set of outcomes and approaches for BCS ensuring that site development, programming, and fundraising efforts align with available resources and community needs over time. Incremental improvements in the site can be matched by expansion in program offerings. By progressing in stages, BCS can steadily advance towards its vision, aligning each step with Midpen.

AN EXAMPLE OF A PHASED PATH FORWARD

Phase 0: Begins immediately upon plan adoption and leverages existing facilities to build momentum through:

- Initiate volunteer-led programming, such as school visits and nature education, to jumpstart public programming and engage the community.
- Conduct site cleanup, essential repairs, and fire safety improvements.
- Launch early fundraising efforts focused on securing operational funds, raising community awareness, and establishing initial partnerships.
- Begin building funding relationships to lay the groundwork for obtaining capital grants.

Phase 1: Starts once required approvals have been obtained (County conditional use permit, regulatory permits, and building permits), that will:

- Increase public programming including such offerings as equine interaction programs, and community events to reach underserved communities.
- Enhance site functionality through key improvements.
- Expand fundraising efforts to target grants, private donors, and partnerships to support infrastructure improvements, subsidize programming, and initiate capital fundraising on some level.

Phase 2: Implemented when additional funding becomes available and milestones are met during earlier phases:

- Expand programming to incorporate therapeutic activities, nature education, and larger public events.
- Pursue larger capital contributions, corporate sponsorships, and long-term partnerships to sustain and grow programming and operations
- Rely on financial milestones: long-term projects such as the renovation of the Tevis barn and further site enhancements.

MANAGEMENT APPROACH

The BCS AHC proposes a nonprofit management model that emphasizes a clear division of responsibilities between the nonprofit operator and Midpen, establishing a partnership that leverages the strengths of both entities. The nonprofit will focus on daily operations, public programming, volunteer coordination, and fundraising, as well as providing promotional materials and staffing for events. Midpen's role will include infrastructure maintenance, ranger patrols for security, and using its public outreach platforms to promote BCS activities.

Joint promotion efforts are anticipated, with Midpen collaborating with the nonprofit to extend outreach through its established public programs, enhancing community engagement with BCS.

NONPROFIT MODEL

The BCS AHC recommends a nonprofit management model as the most effective approach to operate BCS and deliver programs. An agreement with a nonprofit partner could prioritize community values and sustainability over commercial profit, ensuring that programs reflect Midpen's mission, support broad community engagement, and ensure long-term viability through strong governance and diverse funding sources.

A significant benefit of the nonprofit model is its ability to attract donations and grants. These funds would support program development, facility improvements, and expanded outreach, reducing the reliance on boarding fees and other traditional stable revenue-generating activities. This approach would allow the BCS nonprofit the ability to offer a wider range of public programs, using grants to subsidize low-cost or no-cost inclusive options for underserved communities.

The BCS AHCs review of successful and similar nonprofits in the Bay Area indicates that significant cost savings can be achieved through volunteers. This is particularly important in the earliest phase of operations while the nonprofit is building the foundation for growth. Volunteers could help manage public programs, maintain the facilities, and contribute to fulfilling the nonprofit's mission without imposing significant financial pressure on Midpen. Critical roles such as stable manager would be paid positions from the beginning, ensuring high quality care of BCS and animals.

Successful nonprofits often benefit from the support of an advisory board, which provides valuable expertise, community connections, and strategic guidance. While not involved in day-to-day operations, advisory boards complement the governing board by offering insights that strengthen program development, fundraising efforts, and partnerships. This structure helps nonprofits remain responsive to community needs and align their initiatives with long-term goals. With this model the Governing Board could ensure that the policies and decision making for boarding of horses support public programs.

A successful partnership between Midpen and the nonprofit will rely on clear agreements outlining deliverables, timelines, and key milestones. A collaboratively developed contract to set operational requirements of the nonprofit will ensure compliance with Midpen's guidelines and legal

requirements, define roles and responsibilities, and prevent BCS operations from becoming a burden on Midpen staff.

The BCS AHC offers the following recommendations on building a successful partnership between Midpen and the nonprofit overseeing operations (see further detail in Section 3 of the Operations and Programming Working Group report in Attachment A):

- Ensure alignment with Midpen’s mission and BCS Goals
- Facilitate community involvement
- Develop the contract in partnership with the nonprofit
 - Define clear roles and responsibilities
 - Establish financial responsibilities
 - Establish a growth plan consistent with BCS phasing
 - Ensure compliance
- Establish a long-term agreement
- Define deliverables and timelines
 - Include flexibility for renegotiation

MIDPEN RESPONSIBILITIES

In addition to the recommendations above, the BCS AHC recommends that Midpen assume specific responsibilities to support the successful transition and long-term sustainability of BCS. These responsibilities will provide essential infrastructure and maintenance.

Midpen maintenance and operational support

- Provide maintenance support similar to Deer Hollow Farm to keep BCS safe and functional without adding unplanned overhead for staff.
- Responsibilities include improving and maintaining site infrastructure (e.g. structures, roads, water systems) and defensible space, which align with Midpen’s expertise.

Ranger presence and site security

- As in the past, periodic ranger patrols should provide security at BCS.
- As public access at BCR expands, existing patrols can incorporate BCS into their regular routes, offering oversight.

PROGRAMMING

The BCS AHC’s Operations & Programming Working Group (OPWG) envisions BCS as a mission-aligned community resource rooted in a “nature-first” approach. This vision places the preservation of the natural environment and public engagement at the core of BCS’s programming, using equine activities as a foundation to foster connections between visitors and the surrounding landscape.

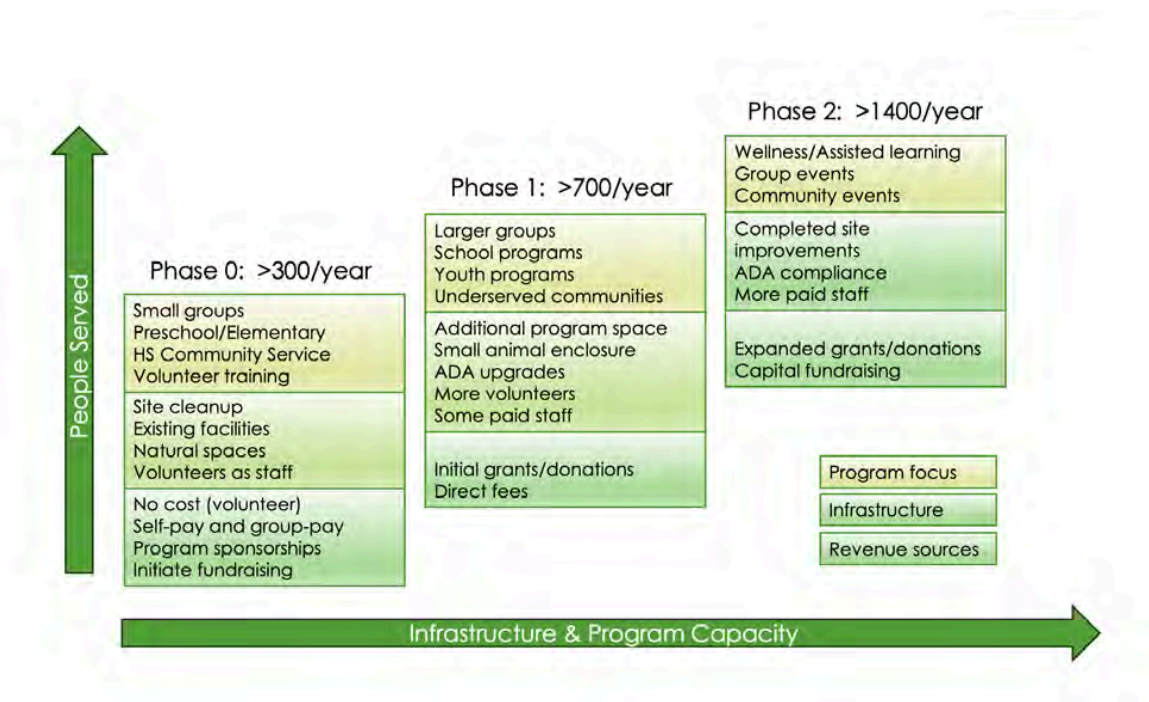
In this nature-centered model, horses serve as essential ambassadors, drawing visitors to Bear Creek Redwoods Preserve and introducing them to the unique ecosystem. Boarded horses may play a dual role, participating in both riding and non-riding programs that are accessible to all ages and backgrounds. This approach ensures that interactions with horses provide a bridge to deeper environmental awareness and stewardship, particularly for younger visitors who may be seeking ways to unplug from technology and engage in outdoor activities.

BCS has a rich tradition of boarders contributing to public programs through volunteerism, and continuing to attract mission-aligned boarders will further enhance community involvement. These individuals not only support programming through their service but could also make their horses available for programming and outreach activities.

Similar to the popular Deer Hollow Farm in Rancho San Antonio, BCS aims to become a destination that provides families and youth with experiences that are both educational and immersive. Targeted outreach will encourage schools, youth groups, and community organizations to explore BCS through structured programs, field trips, and volunteer opportunities, nurturing future generations of environmental stewards and community volunteers.

Integrated program growth, funding, and site improvements

This chart illustrates how a phased approach can integrate program expansion, infrastructure, and funding to serve more people over time in immersive, educational programs. Each phase outlines target groups, site upgrades, and revenue sources.



BCS can serve diverse groups through thoughtful programming. We have identified the following core community groups that would benefit from enhanced public programming at BCS:

- General public
- Underserved, special needs, and diverse communities
- Schools, youth groups, and educational institutions
- Outdoor and nature enthusiasts
- Corporate groups and volunteers
- Equestrians and horse enthusiasts

In all phases, BCS provides opportunities for a wide variety of programming experiences, including nature education, historical, and equine. Each program area is organized into distinct “stations,” which collectively form a flexible and adaptable “module.” A module is a set of stations designed to cater to the specific ages, abilities, interests, and visit duration of each group of visitors.

This “modular program” model allows BCS to customize programs by selecting and combining stations that best fit the needs and preferences of different groups. The diagram below shows an example layout of these stations, demonstrating how they can be used to create unique, engaging experiences that align with BCS’s nature-first mission while incorporating equine elements as a foundational component.

Programming Areas



Attachment A: *Operations and Programing Working Group: Final Report and Recommendations* includes a table in Section 2.5 that outlines 14 program areas, detailing the types of activities possible in each and illustrating their use within the modular program model. This table demonstrates how each area can support tailored experiences, such as a preschool visit or a docent-led hike, aligning with BCS’s mission to serve a broad range of participants.

In the phased model, fundraising can be used to enhance the modular programs, for example adding a small animal enclosure that will provide enjoyment and education for children and adults alike.

By adopting the proposed programming, BCS can initially serve hundreds and grow to thousands of participants over time, providing immersive, hands-on experiences with a strong connection to nature. These high-engagement visits—comparable to school trips to Midpen’s Daniels Nature Center or docent-led activities—offer meaningful educational interactions.

SITE

The BCS AHC Site Design, Architecture, and Engineering (SDAE) working group developed its recommendations by evaluating the site layout, building reuse, utilities, and cost-saving opportunities based on the May 14 BCS Repair Plan. Preserving the site’s cultural character was also a priority, aligning with Midpen’s mission and the BCR Preserve Plan.

As a team of experienced architects, engineers, builders, and site planners, the SDAE focus extended beyond immediate repairs to identify long-term design, infrastructure, and circulation needs that improves safety for people and horses. The SDAE team’s work was based on value engineering studies and alternative site proximities and adjacencies. Grounds and systems maintenance and ecological impacts all played a major role in the determinations and findings presented here. The SDAE team also met on-site with several local and national infrastructure contractors and engineers who made suggestions and provided estimates on project elements. Input was solicited from local building and fire officials to develop the SDAE’s recommendations.

The SDAE concluded that improving BCS is a better investment than closure (estimated by staff to cost \$1-2 million for restoration), given the opportunities for expanded public access and broadened programs. The SDAE team envisions BCS becoming an educational and interpretive community asset, including programs similar to Deer Hollow Farm, with the potential also to tell the story of the land’s rich history. Basic repairs would allow programs to flourish and improve amenities to attract and retain boarders, reestablishing BCS as a valued community resource much like other Midpen preserves.

The SDAE working group concurs with many of the staff’s revised recommendations from the Repair Plan. SDAE and staff agree on numerous additional items with some modifications. These are detailed in Table 1, Attachment B, and are not repeated here. Staff have indicated that adopting these SDAE recommendations will result in significant cost savings.

In two areas, SDAE recommends alternatives:

- (1) road development/site circulation and
- (2) placement of the caretaker’s cottage/ADA-compliant restrooms and parking.

Neither the Repair Plan nor the scope of SDAE's work included fully developed cost estimates. SDAE realizes that cost may not be the primary determinant of the better alternative. Program needs, safety, and increased site use are some of the factors to be weighed in making a decision on how to move forward. Additional details on the SDAE's recommendations are available in Attachment B: *Site Design, Architecture, and Engineering Working Group Report*.

SITE LAYOUT AND CIRCULATION

The recommended placement of structures, roadways, and circulation during Phases 0 and 1 are shown on the two maps on 14 and 15. The SDAE recommended road alternative is fully compliant with the Fire Marshal's expressed preference and requirements. A separate diagram shows the boarder area. It relates to some elements of the two site-plan maps.

N.B: The terms "upper" and "lower" refer to elevation, not direction. The "upper" road, on the southern side, is higher in elevation and leads to the boarding area, while the "lower" road, on the northern side, is lower in elevation and leads to the main program area.

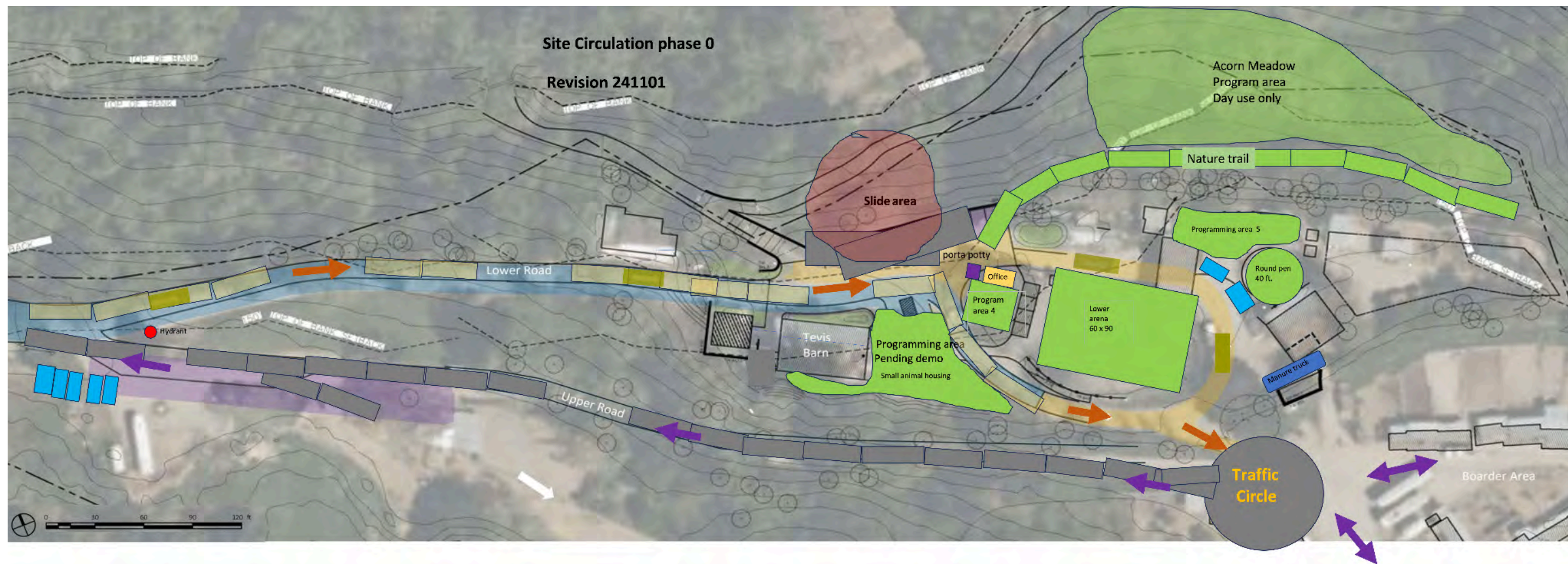
Operations Phase 0 (site changes predominantly clean-up)

- Vehicles en route to the program area use the lower road at the "Y" (one-way in). Passengers are dropped off and vehicles continue past the Tevis Barn along the south side of the arena, then up to the traffic circle and exit on the upper road – creating a loop that avoids congestion and enhances safety.
- The existing ADA Porta-Potty remains in place.
- Map shows usable program areas in green, including the Acorn Meadow, a low-intensity immersive experience linked to a nature trail (existing footprint).

Operations Phase 1 (programs expand consistent with infrastructure changes)

- New and expanded program areas shown in green include the site of prior Foreman's residence, re-use of "casita" for ecological activities, increases in usable arena and round pen sizes, and new program area adjacent to Tevis Barn.
- Vehicles en route to programs and boarders use the two-way upper road. Program drop off is at the traffic circle; vehicles also exit on the upper road.
- The "lower" road (one-lane) is restricted access only for deliveries, staff, and ADA parking so the main program area is nearly traffic-free.
- Roadway layouts shown also satisfy the Fire Marshal and Santa Clara County permit requirements for fire fighting access.
- Hillside rainwater runoff is channeled into swales (blue margins next to the roadway) to avoid seasonal flooding (a source of past road damage, safety, and health concerns).
- Excess soil from the upper road work would be used onsite to improve drainage in both arenas and to be used for other remediation for runoff control.
- New caretaker residence and new ADA restrooms and parking are sited near the new septic leach field. Relocating these from the Repair Plan layout, which placed them near the Tevis Barn, significantly reduces the trenching and depth of excavation needed.
- Parking and a "service yard" are located near the "Y."

SITE CIRCULATION / SITE PLAN – PHASE 0



Site circulation / site plan – Phase 0:

Maintain lower road as single traffic in and upper road as single traffic out.
 Route traffic past the Tevis Barn and continuing on the south side of the arena,
 to the traffic circle and out on the upper road.

SITE CIRCULATION/ SITE PLAN – PHASE 1



Site circulation / site plan – Phase 1:

Use the upper road as the main traffic pattern into and out of the facility.

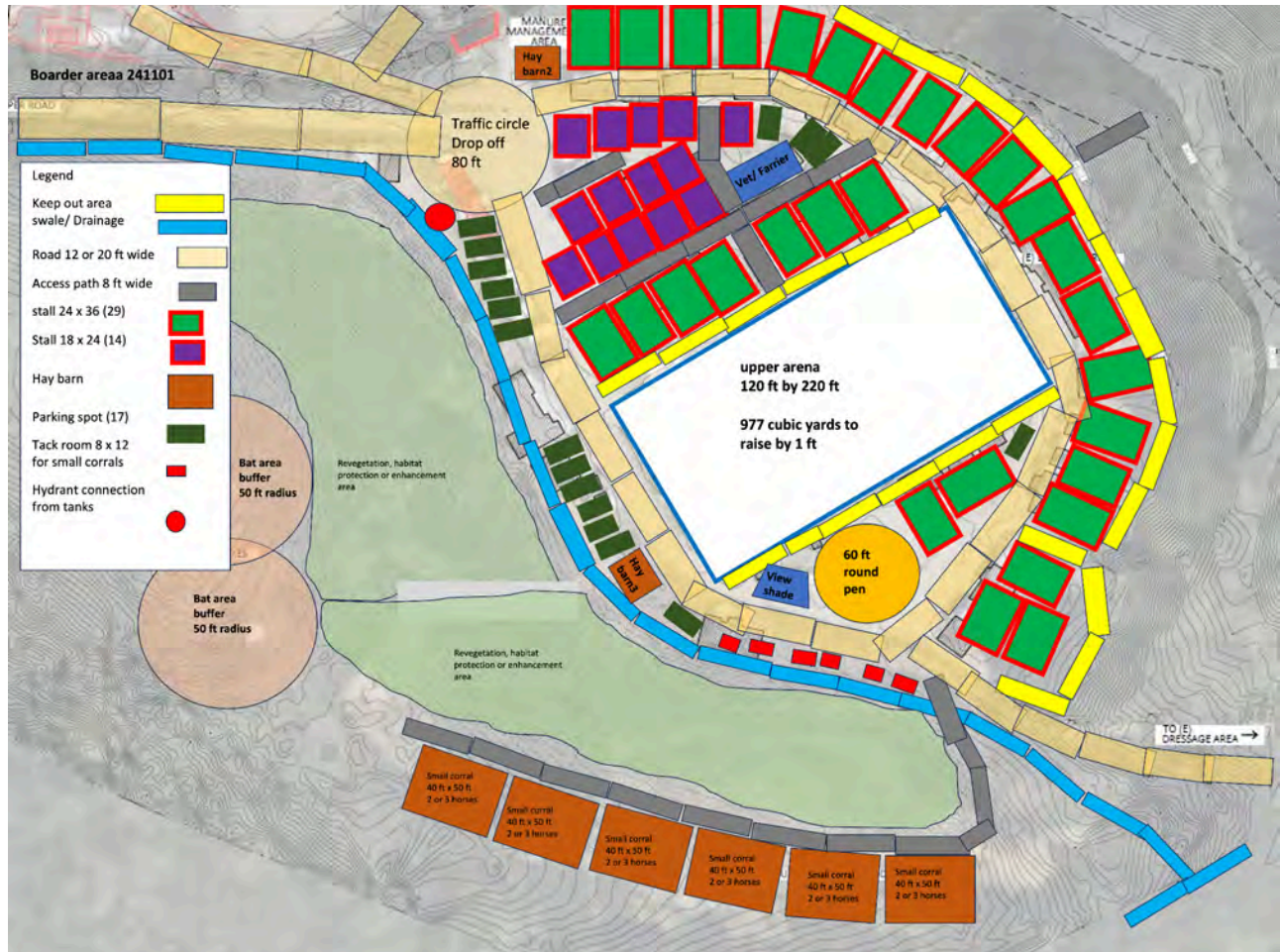
Use parking at the “Y” (junction of two roads at left side of map) for people who want to walk into the program area.

For the benefit of safety, restrict traffic on the lower road to deliveries, ADA, and staff access.

Use the traffic circle for drop off and pickup of program participants.

BOARDER AREA

A possible rendition of the boarder area was developed as an element of the site design for BCS prepared by the SDAE working group. It is shown for reference to the other site plans, as it includes some related elements (e.g. drainage, site circulation, access to dressage area). On May 14, staff recommended improvements to this area be deferred. Some paddocks may be added as accessory structures during Phases 0, 1, and beyond. Other work will be done consistent with funding and usage requirements. For example, excess dirt from road improvement can be used onsite to improve some of the boarder arena and/or dressage area.



Boarder Area:

Rendition of potential placements of paddocks is for reference. West side restoration and drainage will minimize water into the boarder area. Features include boarder parking, modular hay barns, trailer parking, bleachers adjacent to upper arena, access trail to dressage area, and vet/farrier work areas.

COST SAVINGS

While not all discrete elements of the Repair Plan had cost estimates, the SDAE identified several areas of potential significant savings. The amounts below are estimates showing ~\$1.5 million in direct savings during Phase 1, though some costs may need to be netted against these savings. The SDAE conducted field investigations with construction professionals and engineers. The saving estimates shown were developed with their input.

Estimated Savings	Description
\$1,050,000+	<p>Reduce construction costs through site redesign. Example: eliminate the need for concrete retaining walls by shifting the parking from the lower area to the upper road (eliminates one 3-section retaining wall and avoids impacting a slide area) and relocating the new caretaker's residence and ADA restrooms near the leach field (eliminates a 2-section retaining wall).</p> <p>Note: Relocating the caretaker's residence and ADA restrooms so they are closer to the leach field would yield further savings by reducing trenching and leach field excavation costs.</p>
\$260,000	<p>Reduce cost by using nonprofit-managed contractors. Example: savings shown are based on comparison of estimates from commercial contractors who met with SDAE with estimates from the Repair Plan for the sewer system and leach field serving the caretaker residence and ADA-compliant toilets.</p>
\$195,000	<p>Reduce costs and improve operational efficiencies by using alternative solutions. Example: Replace a single, new large hay barn specified in Repair Plan with three smaller, distributed structures.</p> <p>Note: Potential additional savings from reduced need for fire sprinklers and related water storage.</p>
\$780,000	<p>Identify capital projects that may be funded by donors.</p> <p>Example: Tevis Barn rehabilitation.</p>

Staff previously recommended deferring \$1.5 million in improvements to the upper boarder area. This may become a set of projects developed and paid for by the nonprofit and volunteers. SDAE did not analyze potential cost savings for this scenario.

SDAE team members have expressed a willingness to work further with staff, contributing their professional expertise and detailed knowledge of the site.

FINANCING THE BEAR CREEK STABLES PLAN

The BCS AHC offers an approach to financial success for BCS that (1) ensures that the nonprofit operator is financially self-sustaining through all phases and (2) that the nonprofit can develop strong fundraising capabilities to cover deferred capital improvements. The result will be less financial demand on Midpen while the public enjoys an array of programs offered at a well-developed and maintained facility.

The model described below results from research done by the Operations and Programming Working Group (OPWG) and by the Funding and Partnership Working Group (FPWG). Their research collectively evaluated successful equine facilities, many of which have both boarding and donor-supported programs, and six successful nonprofit operations with revenues of over \$1 million. They spoke with more than 80 organizations and people whose activities and/or mission are similar to the vision for BCS outlined in this report. (Lists of the organizations researched are in appendices to Attachment A and Attachment C.)

Based on that research, the BCS AHC has developed a two-pronged revenue model and a realistic implementation plan that demonstrates the feasibility of such an approach:

1. Program-Based Revenue Generation

- **Self-Supporting Boarding Operations:** From the outset, BCS's boarding operations can be financially self-sustaining. Detailed financial projections demonstrate that with a census of 30 horses, the boarding component will cover operational expenses while generating a surplus. More detail is listed in Attachment A, Appendix G: Sample Budget which provides specific cost and revenue assumptions.
- **Community-Oriented Programs:** An expanding array of programs will serve large and diverse communities. By leveraging the stables, horses, and the unique open space setting, BCS can offer educational and recreational programs such as riding lessons, environmental education workshops, equine-assisted therapy, and youth outreach initiatives. These programs can generate revenue through participation fees while fulfilling Midpen's mission to connect people with nature. Some program costs can be underwritten as described below, so that programs can be accessible to underserved populations on a sliding-fee or no-fee basis.

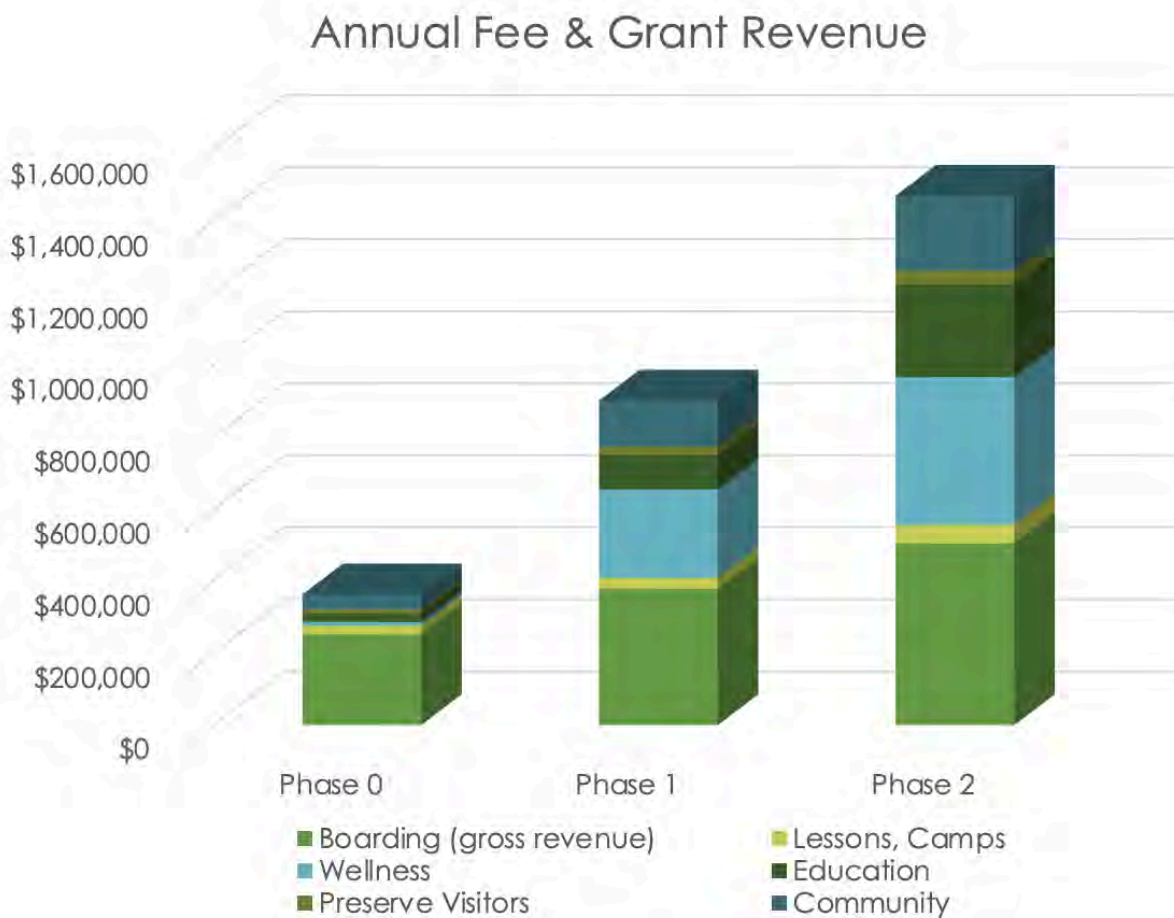
2. Fundraising and Grants

- **Grants and Sponsorships:** Government agencies, schools, private foundations, and corporate sponsors have been identified that will support environmental education, wellness programs, community programs, and historical preservation. This external funding can significantly offset both operational costs and capital expenditures.
- **Fundraising/Capital Campaigns:** A nonprofit operator can target fundraising efforts to support capital improvements, historic preservation, and program development. Major capital campaigns could focus on the historical significance of the Tevis Barn and the cultural heritage of BCS. Donations can be sought from individuals,

foundations, and corporations who have demonstrated an interest in historic preservation and community enrichment.

- Local 501(c)(3) Partnerships: Successful nonprofits in the Bay Area demonstrate the potential for sustained community-backed funding through donations, sponsorships, and partnerships. In addition, well-known organizations are seeking additional program space like that at BCS. This interest in using BCS as a shared program venue offers a BCS nonprofit operator a valuable revenue stream. More detail on these examples can be found in Attachment C: *Fundraising and Partnerships Working Group Report*.

This stacked bar chart series from FPWG’s funding analysis shows that while boarding revenue makes up a large portion of total income initially, its share decreases significantly as the nonprofit is able to grow other funding sources such as wellness, education, and community grants, along with program fees.



This revenue model focuses on achieving the following outcomes:

- Cover operational and programmatic costs: Funding will be allocated to staffing, maintenance, utilities, and program supplies.

- Fund stable maintenance: Revenue will help maintain paddocks, arenas, and other facilities, including establishing a dedicated fund to improve infrastructure and comply with Midpen's operational standards.
- Diversify revenue streams: BCS will develop multiple income sources, such as program fees, boarding services, grants, donations, and corporate sponsorships.
- Expand programs and outreach: Program growth will include educational offerings, community engagement initiatives, and increased access – particularly for underserved populations.
- Fund capital projects: Long-term capital projects will be pursued as BCS's programming and fundraising capacity expand. The nonprofit will seek grants and donations aimed at substantial capital improvements, such as the Tevis Barn renovation. In later fundraising phases, larger foundation grants will be targeted to secure the necessary funding for these critical projects. Further information about these funding opportunities can be found in Attachment C.

IMPLEMENTATION PLAN

The FPWG analyzed how a nonprofit could develop diverse revenue streams to achieve long-term financial stability for BCS (see the funding analysis table from FPWG in Attachment C). This analysis draws on extensive research and insights from over 60 organizations and individuals, incorporating proven practices in nonprofit funding and partnership development. The proposed funding scenario outlines a practical approach for growing revenue to support operational needs, reduced cost programs for underserved communities, and long-term capital campaign goals.

Phase 0 establishes an initial funding base by focusing on grants and fees, primarily for education programs and building community awareness. These foundational grants create financial stability to launch core programs and initial community awareness will be a basis for future donations and program participation.

Phase 1 builds on this foundation by developing consistent grant income while also initiating focused fundraising activities. Community-based events play a key role in this phase by expanding the nonprofit's donor base and increasing unrestricted funding. This phase emphasizes developing relationships with grant-making bodies and corporate sponsors to ensure a reliable stream of support across programs like wellness and education. Contact will be made with potential donors who can support future major capital campaigns.

Phase 2 aims to amplify the revenue streams by strengthening partnerships with grant-makers and increasing the frequency and scale of fundraising events. In this funding analysis, the FPWG projected significant potential growth in grant funding from partners such as Mustard Seed and corporate sponsors. Fundraising events, memberships, and corporate contributions become key drivers of revenue growth, as the organization builds a diverse and sustainable funding portfolio. A multi-year plan to develop relationships with major donors should allow the nonprofit to plan future major capital improvements.

CONCLUSION

This report presents a comprehensive, phased plan to revitalize Bear Creek Stables, transforming it into a vibrant community resource that will vastly increase the public benefit of both the stable area and the surrounding preserve. While the implementation of this vision will require significant effort and the collective energy of the community, it offers a clear path forward through nonprofit management, community-oriented programs, essential site modifications, and sound fiscal management.

Acknowledging the challenges ahead, this plan provides the nonprofit, in partnership with Midpen, the flexibility to coordinate each phase as it unfolds on the ground. The proposed approach allows for adaptation and collaboration so that site improvements, program expansion, community outreach, and fundraising are well-integrated and build on Midpen's significant financial and staff-time investments.

This proposal aligns with Midpen's mission and its goals for BCS by offering enriching, nature-immersed programs to a broader audience, fostering deeper connections to the environment and local history. The potential benefits to the community are substantial.

Ultimately, with the commitment of all stakeholders, Bear Creek Stables is poised to become a cornerstone of community engagement and environmental stewardship for generations to come.

ATTACHMENT A

OPERATIONS AND PROGRAMMING
WORKING GROUP REPORT

OPERATIONS & PROGRAMMING WORKING GROUP
BEAR CREEK STABLES AD HOC COMMITTEE

FINAL REPORT AND RECOMMENDATIONS



Director Craig Gleason, Chair

Working Group Members:

Mike Buncic
Stacey Douglas
Robert Filkowski
Cathy Gromer
Ron Gromer
Diane Hunter
Peggy Kauffman
Toni Kent

Ayako Lainez
Sue Landaiche
Clint Meek
Rick Parfitt
Cristin Reichmuth
Jenny Whitman
Manal Zayed

TABLE OF CONTENTS

EXECUTIVE SUMMARY.....	3
KEY RECOMMENDATIONS.....	3
ROOTED IN HISTORY, GUIDED BY STEWARDSHIP, OPEN TO ALL.....	4
1. AN OPPORTUNITY FOR GREATER PUBLIC ACCESS.....	5
2. EXPANDED PROGRAMS AND PHASED IMPLEMENTATION.....	6
3. OPERATE BEAR CREEK STABLES THROUGH A NONPROFIT MODEL	14
A PATH FORWARD.....	19
APPENDIX A: MIDPEN MISSION STATEMENT.....	20
APPENDIX B: MARKET CASE STUDIES.....	21
APPENDIX C: MIDPEN SITE REPAIR PLAN.....	24
APPENDIX D: FEASIBLE PROGRAM TYPES.....	25
APPENDIX E: PHASED IMPLEMENTATION EXAMPLE.....	29
APPENDIX F: MIDPEN OPERATIONAL REQUIREMENTS.....	31
APPENDIX G: SAMPLE BUDGET.....	32
APPENDIX H: EXAMPLES OF REVENUE SOURCES.....	33

EXECUTIVE SUMMARY

Bear Creek Stables (BCS), nestled within the Santa Cruz Mountains, is more than an equestrian facility—it is a bridge between the region’s rich history, community, and the surrounding environment. Located within the Bear Creek Redwoods Open Space Preserve (BCR) and a short distance from Alma College—a site Midpeninsula Regional Open Space District (Midpen) has dedicated to cultural preservation—BCS represents a 100-year-old legacy woven into the natural landscape. Midpen now has a unique opportunity to align the future of BCS with its mission by transitioning from a profit-driven equestrian operation to a public-centered model focused on education, environmental stewardship, and community engagement.

To fully realize this opportunity, the Operations and Programming Working Group (OPWG) recommends expanding public access through diverse programs that align with Midpen’s mission and the goals of the Bear Creek Redwoods Preserve Plan. These programs should integrate nature-based education, volunteer participation, and community service opportunities while maintaining the core elements of a working horse stable, establishing Bear Creek Stables as a vital community resource.

The OPWG recommends adopting a nonprofit management model. Operating under a nonprofit model will ensure the stability and growth of these efforts, balancing operational needs with revenue generation to create a sustainable path forward for the stables and the broader community.

KEY RECOMMENDATIONS

- **Enable expanded public access through programs that align with Midpen’s mission and BCS Goals:** Serve large and diverse communities with programming that leverages the stables and horses as well as the unique setting in an open space preserve.
- **Implement a phased approach to site improvements and programming:** Early programming should focus on smaller, community-based activities, expanding as site improvements are completed. This phased approach allows for manageable growth.
- **Adopt a nonprofit management model to operate BCS and deliver programs:** An agreement with a nonprofit partner could prioritize public service and sustainability over commercial profit, ensuring that programs align with Midpen’s mission while establishing reliable management with clearly defined roles and responsibilities for operating the stables.

ROOTED IN HISTORY, GUIDED BY STEWARDSHIP, OPEN TO ALL

Tucked within the folds of the Santa Cruz Mountains lies Bear Creek Stables (BCS), a quiet and unassuming corner of the Bear Creek Redwoods Open Space Preserve. At first glance, Bear Creek Stables appears weathered, with leaning fences and the Tevis barn bearing the marks of countless hooves and hands over the years. Yet to those who know it well, this place is far more than an aging facility. It is a bridge between past and present, between people and the land, and between community and nature.

The history here runs deep. Just a stone's throw from Alma College, another Midpeninsula Regional Open Space District (Midpen) landmark dedicated to cultural preservation, Bear Creek Stables nurtures a 100-year-old legacy. BCS represents a living thread of that history, woven into the broader landscape of Midpen's open space preserve. The stables is a place where the stories of old meet the new possibilities of today, presenting an opportunity for a significant transformation.

At the heart of this transformation is the idea of shifting from a traditional, profit-oriented equestrian model to one that prioritizes public engagement and environmental education, fully aligned with Midpen's mission. Horses remain foundational to the stables, but they need not dominate every aspect of the experience. Instead, they act as bridges—introducing children, teenagers, and families to the natural world. When working with horses, young people become more attuned to the environment around them—catching the scent of bay laurel after a rain, noticing the hush that falls when wildlife stirs, and observing how horses rely on their senses to move through the landscape. These are moments of discovery that foster a deeper appreciation for nature, moments that may not happen otherwise.

The stables also offer opportunities to diversify programming beyond horseback riding while retaining the essence of a working stable. Programs can integrate everything from nature walks to ecological restoration projects, all while keeping the presence of horses as a vital, grounding element. These animals are more than just participants in lessons—they are ambassadors to the landscape. Whether interacting with children in non-riding programs or providing quiet companionship to volunteers, each horse contributes in a unique way.

A key strength of BCS lies in its community. For years, boarders have been the backbone of the stable's volunteer efforts, contributing ideas, energy, and care to public programs. By continuing to attract boarders who align with Midpen's values, the stables can sustain this vital community involvement, providing both horses and volunteers for future programming. In this way, Bear Creek Stables serves as both a public amenity and a source of partnership, blending recreation with stewardship and drawing future generations to the wonders of the natural world.

1. AN OPPORTUNITY FOR GREATER PUBLIC ACCESS

The Operations and Programming Working Group (OPWG) recommends significantly expanding public access by creating a broad range of programs that will transform Bear Creek Stables (BCS) into the vibrant, community-focused facility described above.

Our recommendations are built around and align with the mission of the Midpen (see Appendix A for the mission statement text) and the three core goals outlined in the Bear Creek Redwoods Preserve Plan:

- Emphasize the protection of the site’s natural resources
- Maximize public benefits by broadening public access and use of the facility
- Develop a viable plan that is financially feasible for both a tenant and the District

The OPWG offers a vision for public programs at BCS, detailed in Section 2, *Expanded Programs and Phased Implementation*. This approach relies on using existing facilities initially – increasing program offerings and number of people served over time as infrastructure and public engagement develop.

Key benefits of this approach are:

- A vibrant community space that fosters a connection to nature and history
- A unique opportunity for educational programs and public access to equine activities
- A financially viable solution

Midpen can realize this new vision by implementing a management model based on nonprofit principles, as described in Section 3, *Operate Bear Creek Stables through a nonprofit model*.

Key values for such a relationship are:

- Build partnership into management model – trusted, reliable, experienced
- Prioritize broad community value

2. EXPANDED PROGRAMS AND PHASED IMPLEMENTATION

Key recommendations:

- **Enable expanded public access through programs that align with Midpen’s mission and the BCS Preserve Plan Goals:**
 - Capitalize on the unique qualities of the stables and horses to provide programs that attract and serve large and diverse communities
 - Expand beyond equine programs: Leverage the unique setting in an open space preserve to incorporate nature-based and educational activities to serve diverse audiences.
 - Develop a modular program model: Offer flexible, rotating programs in nature education, equine interaction, and stewardship
- **Implement a phased approach to site improvements and programming:** Early programming should focus on smaller, community-based activities, expanding as site improvements are completed. This phased approach allows for manageable growth.

The OPWG program planning team conducted extensive research with both commercial and nonprofit organizations who provide the community with animal interaction programs in the general Bay Area. Through a combination of online research, live interviews, and site visits, we studied the audiences served and best-practices of providers who offer the public a hands-on opportunity to learn about nature and learn about themselves by interacting with animals in a friendly, supervised environment. These organizations offered an impressive array of creative programs that reach out to historically underserved groups, such as individuals facing economic hardship, people with disabilities, neurodiverse individuals, older adults, and military veterans, as well as the general public. Our research also explored their varied management schemes and finances (for detailed information about the case studies collected see Appendix B).

The findings and recommendations of the OPWG program planning team were focused on achieving the following six objectives.

2.1 ALIGN COMMUNITY ENGAGEMENT WITH MIDPEN’S MISSION

Visitors to BCS will have the opportunity to engage with the local environment through a variety of activities. Programs will highlight the area’s plants, wildlife, and ecosystems, fostering a deeper connection to nature. Some activities may include interaction with horses or farm

animals. These memorable experiences will deepen visitors' appreciation for nature and MidPen's working stable, fostering continued engagement and future participation.

BCS can serve a wide range of community groups through thoughtful programming. We have identified the following core community groups that would benefit from enhanced public programming at BCS:

- **General public**
BCS can offer family-friendly events, weekend activities, and seasonal programs like nature walks, open house days, and hands-on animal interactions. These activities foster connections to nature and animals, and build a sense of community.
- **Underserved, special needs, and diverse communities**
Inclusive programming can provide access through discounted or scholarship-based participation, ensuring engagement with conservation education and equine activities for populations that might not otherwise have access.
- **Schools, youth groups, and educational institutions**
Partnerships with schools and youth organizations can offer field trips, youth camps, and nature-based education aligned with curriculum standards. Programs focused on environmental stewardship and horsemanship provide hands-on learning experiences for groups like Scouts and homeschool networks.
- **Outdoor and nature enthusiasts**
Nature-based tours, ecology workshops, and habitat restoration events attract those interested in conservation and open space. Programs that explore the relationship between the stables and the environment engage outdoor enthusiasts in stewardship activities.
- **Corporate groups and volunteers**
Service opportunities for corporate teams and volunteers offer meaningful ways to contribute to property maintenance and environmental stewardship, helping fulfill corporate service hour requirements and fostering community connections.
- **Equestrians and horse enthusiasts**
Riding lessons, camps, clinics, and boarding services can engage both experienced riders and newcomers interested in learning horse care and handling, ensuring the stables remain a valuable resource for the equestrian community.

By adopting the proposed programming, BCS can initially serve hundreds and grow to thousands of participants over time, providing immersive, hands-on experiences with a strong connection to nature. These high-engagement visits—comparable to school trips to Midpen's Daniels Nature Center or docent-led activities—offer meaningful educational interactions. Additionally, the stables' proximity to the planned North parking lot, less than half a mile away, will attract a larger number of walk-in visitors. While these visits may be less structured, the presence of volunteer ambassadors can greatly enhance their value, offering interpretive experiences far beyond a typical preserve visit.

2.2 ESTABLISH BOARDED HORSES AS A FOUNDATIONAL ELEMENT OF EQUINE PROGRAMMING

Horses are the heart of the community that attracts and welcomes visitors to Bear Creek Redwoods Preserve and Bear Creek Stables. Every horse – young and old, tall and small, fancy or plain, retired or working – is an ambassador, welcoming the community in their unique way. Using boarded horses in our riding and non-riding programs provides a unique attraction for participants, and it ensures each horse can have a role to play in our public outreach programs.

Historically a core group of boarders at BCS provided the volunteer force and creativity behind public programming. Attracting boarders who share the organization's and Midpen's values will further contribute to public programs, through volunteerism as well as providing horses that can be used in programming. As such, boarding should continue as a foundational element of programming.

2.2.1 POSSIBLE FUTURE PROGRAMMING

We envision BCS as a venue offering meaningful opportunities for a wide range of Bay Area residents, including those who might not afford traditional equine programs. Unmounted programs will emphasize the importance of two-way interactions with animals, fostering personal growth through lessons in empathy, trust, patience, and self-awareness. These activities create space for participants to experience how animals communicate and build relationships, enhancing their understanding of non-verbal connection and diversity.

To reduce costs and broaden participation, the program could incorporate "Ambassador" horses—boarded horses whose owners volunteer them for public engagement. Guided tours of the upper ranch would introduce visitors to the horses' unique roles and heritage, while interactive sessions in smaller arenas might include petting, grooming, groundwork, or horse care. These activities would be customized to the audience, ranging from first-time interactions to more advanced horsemanship lessons.

Future programming might expand to include a small animal enclosure, creating more opportunities for visitors—whether scheduled groups or walk-ins—to engage with animals in a safe, supervised environment. This expansion would attract a broader audience and supplement revenue through a combination of free, low-cost, fee-based, and subsidized programs. Together, these efforts balance sustainable revenue generation with community engagement, outdoor education, and conservation goals.

2.3 PROVIDE TRANQUIL PROGRAM AREAS

BCS provides Midpen with an ideal opportunity to provide Bay Area residents with a rich outdoor experience. The proposed Site Plan provides an idyllic space for visitors to park in the BCS parking lot, then enjoy a short peaceful walk to a safe and inviting destination.

As with Deer Hollow Farm in Rancho San Antonio, BCS will become a popular weekend outing for young families. The added appeal of horses will entice young people to unplug from social media, enjoy the outdoors, and become the volunteers of tomorrow. Outreach efforts will invite organized groups to plan field trips and individuals to participate in classes. Having several program areas allows for several groups to use the site at the same time and enables the use of the modular program model described in 2.4 below.

Recommended programming areas at BCS



2.4 SITE REPAIR PLAN RECOMMENDATIONS THAT WOULD BENEFIT OPERATIONS AND PROGRAMMING

OPWG analyzed the current state and proposed enhancements of the stable grounds to identify potential public programming that aligns with the mission of Midpen.. This analysis took into account existing facilities, anticipated improvements, and the need for sustainable operations that promote both equestrian and nature-focused activities. The group focused on identifying areas within BCS that could be utilized for a wide range of public programming, including nature education, community service, and equine experiences.

The main programming area is shown in the site repair plans (see Appendix C for the Phase 1 site improvements). Currently there are two site options under consideration for this area: .

1. Midpen’s Hybrid Repair Plan places the caretaker cottage to the left side of the Tevis barn (looking north) and the ADA parking and restroom to the right side of the barn. These locations are shown in the diagrams developed by Midpen.
2. The Site Design, Architecture, and Engineering Working Group’s alternate recommendation places the caretaker cottage and ADA parking/restroom on the north side of the traffic loop, with the cottage closer to (a bit north of) the current location of the breezeway barn.

The OPWG considered both options and has a preference for the repair plan (option 1 above) as it creates a large and unbroken area for programming. We acknowledge the desire for more private and separate spaces but believe those needs can be covered by the Acorn Meadow and Dressage area. Between dropoff and pickup times, programs can move around to different stations in that area without crossing active roads. Because the cost implication of the alternative is unknown, the OPWG recommended carrying forward both options to the November 20, 2024 board meeting. Diagrams below assume option 1.

Suggested enhancements to Midpen’s Repair Plan are:

1. An appropriately protected small animal enclosure (for example for goats) somewhere in the main programming area.
2. A moderate enlargement of the lower round pen. Increasing its size will allow flexibility for more types of programming.
3. A shaded, covered area to gather near the current location of the hay barn.

For the three enhancements above, the OPWG is flexible on phasing. It is expected that these enhancements are attractive targets for fundraising so costs might be borne by the nonprofit.

2.5 DESIGN MODULAR PROGRAMS FOR A DIVERSE AUDIENCE

BCS will attract ‘kids of all ages’ and groups of varying sizes and interests. The OPWG has modeled programming that will flex with each group’s ages, abilities, and length of visit. More importantly, we can design a program that matches the interests of the group and the goals of their leader. This model also allows the program offerings to flex with the skills of the volunteers and staff, the weather, and site development schedules.

OPWG suggests that a modular program model could accommodate group visitors by creating “stations” that participants rotate through during their guided visit. This structured approach also ensures that groups remain in designated areas.

Each station could be tailored to different aspects of the nonprofit’s educational and equestrian offerings, allowing for customizable experiences based on the group’s age, interests and needs. Stations may include nature and historical education, horse interaction, and hands-on animal care

activities. This flexible model will allow programs to cater to a wide range of audiences, from children on school field trips to families, community service groups, and special interest visitors. Two examples of modular program flow at BCS are shown on these maps.

Example Program Flow 1: Preschool Visit



Example Program Flow 2: Docent-Led Visit



Due to the compelling opportunity to interact with horses while visiting BCR, the modular model enhances community interest in participating in docent-led nature hikes and other educational programs. The following chart demonstrates how a variety of programs will utilize the facilities and meeting spots on the property.

Example List of Rotating Stations by Area

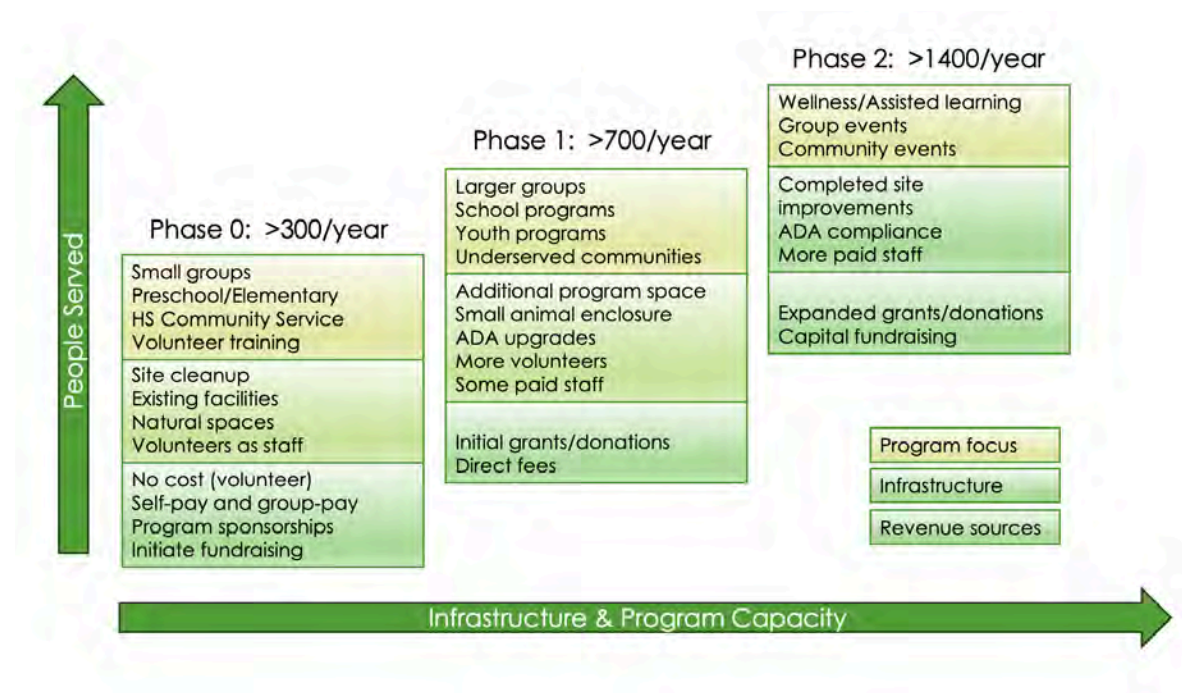
Area	Menu of Program Stations	Examples	Preschool Visit	Docent-led hike
BCR Trails	Nature, Wildlife, and History hikes	Birding, plants/galls, tracks, scat, geo-caching, treasure hunt		From/to Alma
Lower Round Pen	Horse and Pony interactions	Ambassador horse(s), round pen demo, grooming, pony co-op	quine meet & greet	
Lower Barnyard	Barnyard animal interactions	Petting, behavior, handling, husbandry	Petting, handling	Animal husbandry
Lower Arena	Horse and pony demos, camps, lessons, and photos	Equine demonstrations, unmounted and unmounted horsemanship classes, riding lessons	Equine demonstration	Equine demonstration, meet & greet
Chimney Platform	History, nature, and wellness talks	Nature talks, wellness talks		BCR/BCS History
Lower Covered Space	Nature and animal talks	Pony Express, Settlers, Cowboys, Soldiers, Horseback Libraries (next to round pen)	History, fun	
Meadow Areas	Art, Crafts, Music, and Movement	Painting, yoga, build bird houses, hand-made drums circle, stick horses		
Acorn Meadow	Circle-up and Picnic areas	Nature/Animals story time	Nature, fun, snack	Nature interpretation
Dressage	Large-group space and natural playground	Private rentals for reunions, team-building, camp station		
Upper Arena	Riding lessons and camps	Provided by approved onsite instructors		
Upper Stables	Guided stable and facilities tour	Volunteer guides, signage, property map, stall signs to introduce horses		Synanthropy
BCS Lower + Upper	Community and Corporate Engagement	Demo stations; Breyer horse show, open houses, fundraisers, volunteerism		
BCS and BCR	Community service and volunteers	Animal care, facility maintenance		
BCS and BCR	Environmental Education and Stewardship	Manure mgt, erosion, water conversation, weeds, native plant restoration, fire mitigation		

2.6 IMPLEMENT A PHASED APPROACH TO PROGRAM GROWTH

In alignment with the Site Development Plan presented by Midpen staff and the Site Design, Architecture, and Engineering Working Group site plan, the OPWG explored a phased timeline as a feasible approach to programming opportunities. This approach allows programs to grow as the nonprofit’s capacity and instructional team expands, facilities are upgraded, and sponsors are secured. The feasibility plan emphasizes an early start with Phase 0, utilizing existing facilities to begin programming before major capital improvements are begun. Note that many aspects of program phasing are not dependent on specific site improvements, for example the nonprofit’s programming late in phase 0 could be much more extensive than at the beginning of the phase.

Each phase builds on the previous one, gradually expanding the range of public programming and outreach. This phased strategy ensures alignment with Midpen’s goals for BCS, fostering education, community engagement, and equine experiences at every stage of development.

Example of Program Growth



The graphic above outlines a sample phased approach to programming at BCS, showing potential programs, target audiences, and projected participation. Each phase reflects increasing program complexity and outreach as facilities improve and capacity grows (see Appendix D for a more extensive list of feasible programs that could be offered by the BCS nonprofit and Appendix E for an example of a phased model of implementing programs).

3. OPERATE BEAR CREEK STABLES THROUGH A NONPROFIT MODEL

The OPWG recommends a nonprofit management model as the most effective approach to operate BCS and deliver programs. An agreement with a nonprofit partner could prioritize public service and sustainability over commercial profit, ensuring that programs reflect Midpen’s mission, support broad community engagement, and ensure long-term viability through strong governance and diverse funding sources. Based on our research, and knowing the interests of the community and Midpen, we offer the following additional recommendations for establishing such a model.

- **Ensure alignment with Midpen’s mission:** Midpen should maintain the stable's role as an operational equine facility that provides education and public outreach, ensuring programs contribute to conservation and public engagement goals.
- **Ensure alignment with the BCR Preserve Plan and BCS Goals:** The operation of the stables should remain consistent with the overall goals for the preserve, emphasizing environmental protection and public access.
- **Facilitate community involvement:** Midpen should identify a nonprofit with a strong commitment to engage with the community by recruiting volunteers and building partnerships with schools, businesses, and other organizations.
- **Develop the contract in partnership with the nonprofit:** Midpen should work with the nonprofit to refine the contract, ensuring it provides the clarity needed for the nonprofit to align its business plan and programming.
 - **Define clear roles and responsibilities:** Any agreement should outline the financial and operational responsibilities of both parties, specifying which infrastructure improvements Midpen will finance and what the nonprofit will manage and maintain.
 - **Establish financial responsibilities:** The agreement could specify that the nonprofit will use revenue and fundraising to support facilities maintenance and contribute to further development, with Midpen funding specific infrastructure improvements.
 - **Establish a growth plan consistent with BCS phasing:** Midpen could structure the agreement so that the nonprofit’s business plans and program expansion are synchronized with the phased development of facilities. This approach ensures that programming evolves in tandem with infrastructure improvements, maintaining financial sustainability and operational feasibility at each stage.
 - **Ensure compliance:** Follow Midpen’s operational and environmental guidelines for the stables.

- **Establish a long-term agreement** to provide the stability necessary for both the nonprofit and Midpen to achieve phased development goals.
- **Define deliverables and timelines:** Any agreement should outline the specific deliverables expected from both Midpen and the nonprofit, along with timelines. This structure would allow either party to use these milestones as a basis for evaluating the contract's success and making adjustments as needed.
 - **Include flexibility for renegotiation:** Midpen could include a process in the agreement for renegotiating deliverables and timelines, ensuring adaptability to unforeseen challenges and avoiding potential contract default.

This model would enable the stables to focus on community outreach and education over generating profit, in alignment with Midpen's BCS goals. Under this model, revenue from profitable programs could be used to subsidize other initiatives, ensuring that Bear Creek Stables' nature, educational, and select equine programs remain accessible to a diverse range of participants, including underserved communities.

The OPWG proposes that a significant benefit of the nonprofit model is its ability to attract donations and grants. These funds can be used for program development, facility improvements, and expanded outreach, reducing the reliance on boarding fees and other traditional stable revenue-generating activities. This approach would allow the BCS nonprofit the ability to offer a wider range of public programs, including grant subsidized, low-cost, or no-cost inclusive options.

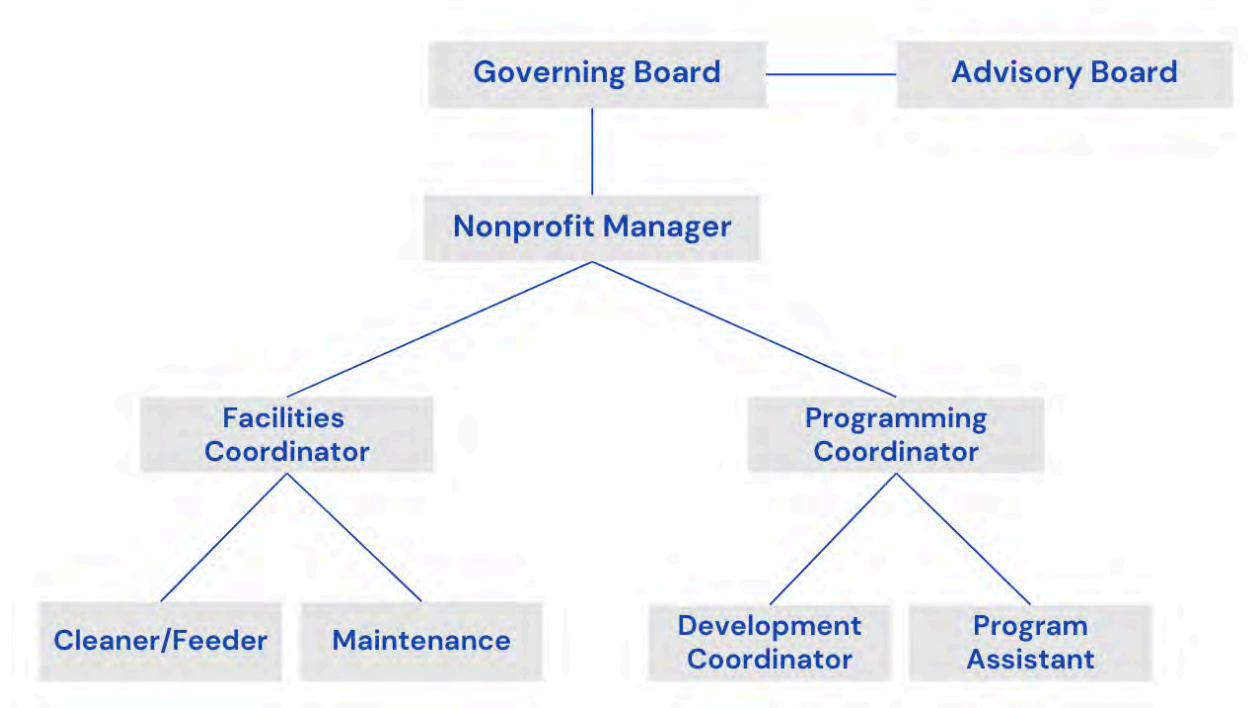
This feasible nonprofit model offers resilience through its reliance on volunteers, particularly in the initial phases of operation where revenue diversification is still being developed. Based on a review of successful and similar nonprofits in the Bay Area, OPWG believes that the stables can successfully operate using a volunteer-based structure for the first phases of BCS site improvements, allowing for significant cost savings while building the foundation for growth. Volunteers could help manage public programs, maintain the facilities, and contribute to fulfilling the nonprofit's mission without imposing significant financial pressure on Midpen.

Successful nonprofits often benefit from the support of an advisory board, which provides valuable expertise, community connections, and strategic guidance. While not involved in day-to-day operations, advisory boards complement the governing board by offering insights that strengthen program development, fundraising efforts, and partnerships. This structure helps nonprofits remain responsive to community needs and align their initiatives with long-term goals.

A successful partnership between Midpen and the nonprofit will rely on clear agreements outlining deliverables, timelines, and key milestones. A long-term agreement will provide both partners with the stability needed to plan and achieve phased development goals. This contract,

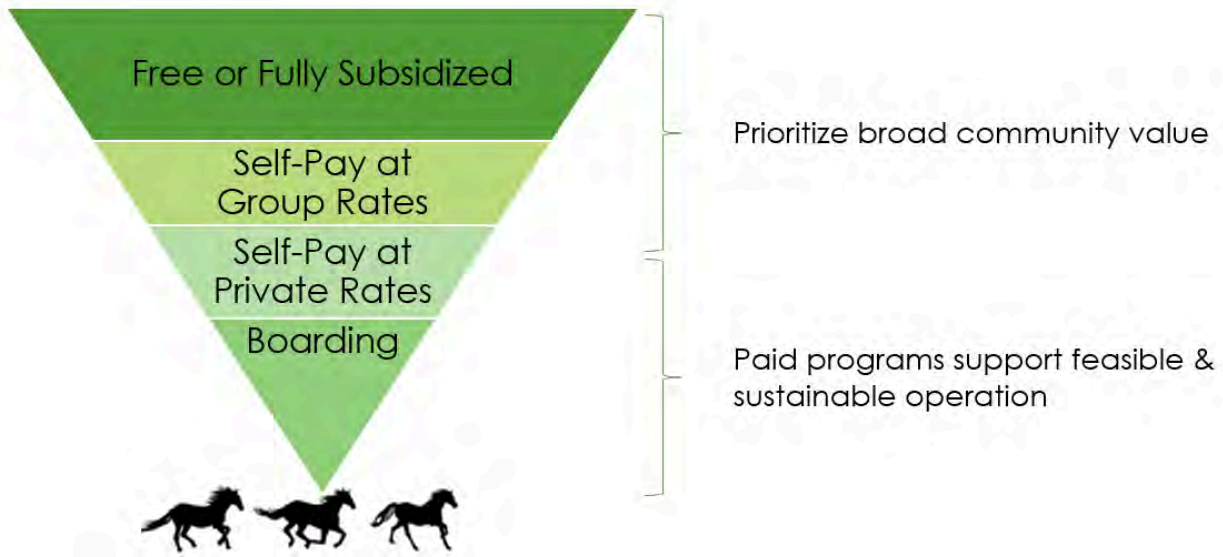
developed collaboratively to set operational requirements of the nonprofit, will ensure compliance with Midpen’s guidelines and legal requirements, define roles and responsibilities, and prevent BCS operations from becoming a burden on Midpen staff (for the current Midpen operational requirements see Appendix D).

Sample organizational chart for full operations after facility improvements



OPERATIONS AND FINANCE

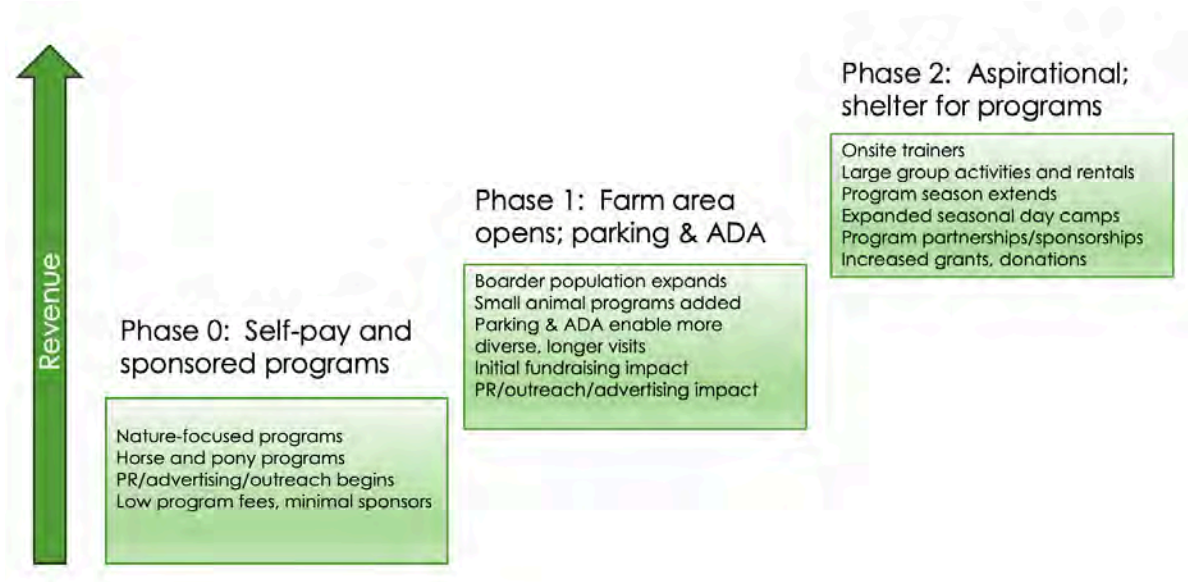
To ensure financial sustainability, the management model for Bear Creek Stables should scale programs sustainably and diversify revenue streams at every phase of development. As operations grow, new income sources such as fee-based camps, long-term sponsorships, grants, and a donor base can be leveraged to support expanded programming. Excess revenue could be reinvested to maintain facilities, enhance programming, and ensure uninterrupted operations.



FINANCIAL SUSTAINABILITY OBJECTIVES

- **Cover operational and programmatic costs:** Ensure sufficient revenue to meet day-to-day expenses, including staffing, maintenance, utilities, and program supplies throughout all phases (a sample initial budget is in Appendix F)
- **Support environmental initiatives:** Allocate funding toward resource management, emissions reduction, and habitat protection, aligning with Midpen's environmental goals.
- **Fund stable maintenance:** Allocate funds to maintain and improve infrastructure, including paddocks, buildings, and safety equipment, in compliance with Midpen's operational requirements.
- **Build a maintenance fund:** Establish a dedicated fund to manage future repairs, unexpected expenses, and long-term facility upkeep.
- **Diversify revenue streams:** Develop multiple income sources such as program fees, boarding services, grants, donations, and corporate sponsorships to ensure financial stability and avoid over-reliance on any one source.
- **Expand programs and outreach:** Secure funding to grow educational offerings, community engagement, and access, particularly for underserved populations.
- **Ensure long-term viability:** Implement sustainable financial practices to prevent excessive debt and reduce dependency on unstable revenue sources.

POTENTIAL SOURCES OF PROGRAM REVENUE



Self-pay

BCS will continue to offer traditional lessons and horse camps on a self-pay visit. Many aspects of these programs will be designed to be unmounted. By minimizing the overhead costs of traditional riding programs, the lessons, camps, and clinics can be offered with lower registration fees. Onsite trainers who board at BCS can apply to offer traditional riding lessons as an independent contractor and may also be hired to teach group programs on advancing horsemanship. In addition, qualified therapists and other specialists can apply to offer self-pay classes or personal sessions that align with our stated objectives.

Example: Advertised classes in Los Gatos/Saratoga Recreation catalog will draw community members to register for a group class.

Group-pay

Outreach marketing will inform the broad community of the opportunity to schedule group visits to the facility for a guided experience. These groups may be clubs, businesses, and schools or family groups celebrating a holiday or reunion.

Example: A girl scout leader could schedule a visit(s) for the troop to visit BCS to work on their Horsemanship Merit Badge. The cost of a group program could be paid from the troop's budget or each girl could pay their own individual fee.

Fundraising

Funding from grants, donations, and campaigns will provide financial assistance to individuals from underserved communities, enabling them to participate in camps, lessons, and other

educational programs. This aligns with Midpen's mission of providing equitable access to public open spaces and ensuring that diverse populations can benefit from the stables.

Example: A scholarship fund will absorb the cost for a designated audience to attend a week of summer day-camp at low or no-cost tuition.

OPWG defers to the Fundraising and Partnerships Working Group for detailed strategies on building revenue streams and projecting long-term financial outcomes (for more examples of revenue sources identified by OPWG see Appendix F).

A PATH FORWARD

In conclusion, the OPWG recommendations present a vision for Bear Creek Stables (BCS) where public programming becomes the primary focus of a working horse facility. This facility would be run by a nonprofit management scheme that promotes community engagement, environmental stewardship and the mission of Midpen. The unique historic and natural aspects of BCS can offer such programs in a manner that is financially sustainable and unique to the offerings at other Midpen properties.

The advantages of the nonprofit management of BCS are many fold: 1) shifting the focus of BCS to diverse and expansive public programming; 2) reinvestment of revenue into the facility; 3) opening opportunities for grants, donations and corporate sponsorships; 4) shifting management of the facility from Midpen staff to the staff of the nonprofit facility; 5) ensuring adherence to Mission through oversight by governing board and appropriate staffing as programs size grows.

BCS has the potential to become a leading example of how a community-based nonprofit can enhance public access to a natural environment and to equestrian activities. BCS can become a vibrant community resource that fosters a connection to nature, introduces meaningful equestrian based public programs and promotes environmental stewardship.

APPENDIX A

Mission statement of Midpeninsula Regional Open Space District

Midpen's mission is to acquire and preserve a regional greenbelt of open space land in perpetuity, protect and restore the natural environment, and provide opportunities for ecologically sensitive public enjoyment and education.

On the Coast, Midpen has an expanded mission: to acquire and preserve in perpetuity open space and agricultural land of regional significance, protect and restore the natural environment, preserve rural character, encourage viable agricultural use of land resources, and provide opportunities for ecologically sensitive public enjoyment and education.

Source: Who we are. (n.d.). Midpeninsula Regional Open Space District.
<https://www.openspace.org/who-we-are>

APPENDIX B

Market case studies

Examples of Best Practices

The following table highlights six nonprofit organizations providing animal-based experiences to Bay Area residents. Each organization generates over \$1 million in annual revenue, primarily through grants and donations.

Organization	Location	Pro Publica Year Est	2022/23 Income
JF Shea Therapeutic Riding	SJ Capistrano	1979	\$9,404 K
The Trust for Hidden Villa	Los Altos Hills	1960	\$4,120 K
NCE Facilitated Therapy	Woodside	1977	\$1,590 K
Jasper Ridge Farm	Woodside	2010	\$1,410 K
Giant Steps Therapeutic Equ	Petaluma	1998	\$1,003 K
Square Peg	Half Moon Bay	2005	\$1,010 K

Demonstrating success: Blending horse operations with public engagement

This section highlights examples of commercial and nonprofit equine-based operations that successfully combine boarding facilities with public programming. These models illustrate how horse operations can serve diverse audiences, offering activities ranging from trail rides and lessons to camps, community events, and animal interactions. Each case showcases how equine experiences attract visitors, foster community engagement, and contribute to sustainable operations.

COMMERCIAL HORSE OPERATIONS demonstrate success with combining a boarding operation with programs that draw the public to enjoy the outdoors through the appeal of an equine experience.

Garrod Farms - This large privately-owned property in the Saratoga Hills was established in 1892. In 1980, the owner gifted 120 acres to Midpen Open Space District. In 1962, the site began operating as a horse facility and now features a variety of boarding options such as paddocks, barn, and fields. Boarders may access 1 covered arena, 5 other arenas, 2 round pens, and 20 miles of trails in Fremont Older Open Space Preserve. Garrod offers public trail riding,

pony-walks, lessons, vaulting, horsemanship programs, clubs, and YMCA programs. Garrod also hosts non-equine (wine-tasting) onsite community activities.

Los Gatos Farms - This 30-acre privately-owned property in the Los Gatos Mountains provides boarding for up to 30 horses. The site features 2 all-weather arenas, 1 round pen, pipe-corral paddocks, and 8-horse barn with grain and tack rooms, and a 3-pony barn. The onsite owner collaborates with two lessees: a) A day-camp vendor who offers seasonal week-long youth camps, mostly in the summer. b) A horse-operator who boards 27 horses and offers lessons, seasonal camps, and birthday parties. Horse programs have included private riding lessons, group lessons, saddle clubs, pony parties, and group retreats, etc. On site is a small petting zoo with goats, rabbits, chickens, and geese that are used for birthday parties and camps.

NONPROFIT EQUINE-BASED ORGANIZATIONS have a unique appeal to a teenage audience, as well as the younger set. Statistics show that at horse stables, today's teenagers frequently become tomorrow's volunteers.

B.O.K. Ranch is a nonprofit established in 1985 with 2023 revenue of \$900K. Their funding includes contributions, San Andreas Regional Center (SARC), and private-pay clients. They reside at Woodside Horse Park which is owned and managed by the town of Woodside. B.O.K.'s mission is to provide the highest quality, recreationally based equine-assisted learning to equestrians of all abilities. As a full-inclusion, neurodiverse riding, horsemanship, and vocational program, B.O.K has a waiting list of students to participate in a variety of self-pay and subsidized equine programs.

Dreampower Ranch is a nonprofit established in 2003 to provide equine-assisted activities and therapies for children, teens and adults with special needs. Their annual income of \$600K is funded by contributions, grants, and private-pay clients. The horses, ponies, minis, and farm animals reside in Gilroy, on a privately owned horse ranch. Dreampower offers family, veteran, and senior citizen programs, with an emphasis on unmounted programs and farm animals. Key staff members are PATH-certified instructors.

NONPROFIT FARM-ANIMAL ORGANIZATIONS demonstrate success in introducing young parents and their children to the pleasures of nature and animals.

Deer Hollow Farm in Rancho San Antonio Preserve is well-known to Midpen. This 150 year-old farm generates \$200K annual revenue as an educational center that offers a pleasant hike to a tidy picnic area and barnyard where visitors are greeted by a range of farm animals, volunteer educators. With support from the City of Mountain View, they accommodate school classes and summer camps, despite the drop-off location being a distance from the farm area.

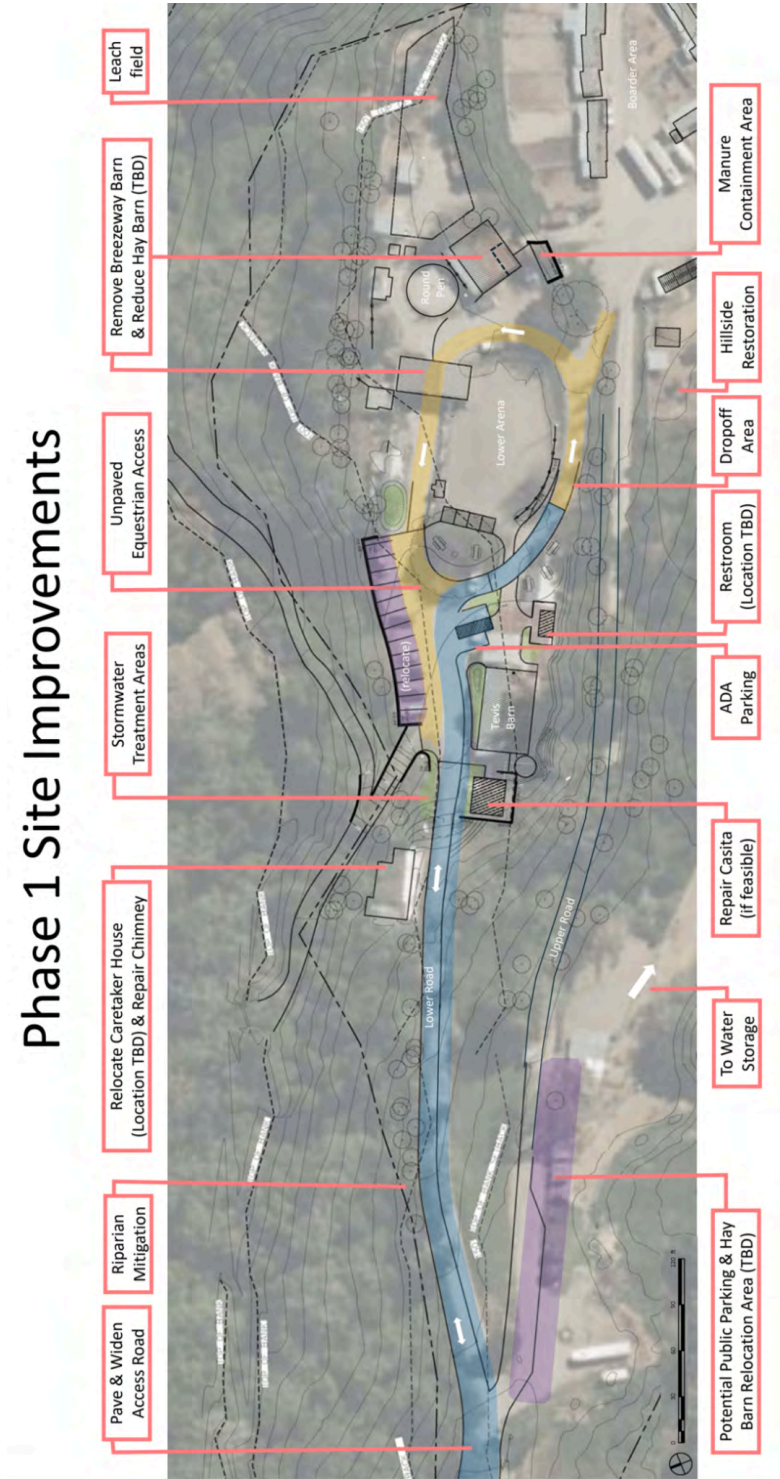
Animal Assisted Happiness was established as a nonprofit in 2009 with current annual revenue of \$500K which is entirely funded through donations and grants. With a mission of "enriching the lives of youth with needs through barnyard animal interactions, they have welcomed 118,000 visitors and report that 60% of their 9,000 volunteers are youth.

NONPROFIT NATURE-EXPERIENCE ORGANIZATIONS demonstrate success with using horses as a draw to their property where guided hikes and historic tours are also offered.

Friends of Wunderlich and Huddart Park in San Mateo County provides programs and events in two historic redwood parks. This includes hikes, environmental education, and historic tours. They share site resources and collaborate on some programs with an onsite equine concessionaire. The \$200K annual revenue fully funds all of their programs.

APPENDIX C

Midpen site repair plan: Phase 1 site improvements



APPENDIX D

Feasible program types

1. Outreach Events:

- Adult and youth community members learn about horse care, maintenance, and basic equine interaction through ground-based activities.
- Hands-on programs for those new to equine activities, emphasizing connection to horses without riding.
- Open house days where members of the public are invited to the stables for equine demonstrations, tours, and crafting events.

2. Docent-Led Tours:

- Educational tours highlighting the history of Bear Creek Stables with a tie-in to Alma College/original Tevis Estate background, the role of horses in the local area, the integration of native species within the stable environment, and Midpen's conservation efforts in the adjacent Bear Creek Redwoods Preserve.
- Tours will focus on the natural landscape, flora, and fauna surrounding the stables.

3. Community Service Days:

- Host volunteer days for high school students seeking community service hours to help with stables maintenance, grounds upkeep, and other facility improvements.
- Host volunteer days for corporate teams or individuals to help with stables maintenance, grounds upkeep, and other facility improvements.
- Workers from local companies needing to fulfill volunteer hour requirements can participate, helping build ties with the business community.

4. Other Adult-Focused Programming:

- Host workshops on horse care, land stewardship, and nature conservation tailored to adults.
- Team-building events for companies, offering experiences in outdoor and equine-related activities.

5. Boarding services

- Targeted towards the maximum capacity the site can support.
- Offering daily stall cleaning, twice-daily feeding.
- Operated in full compliance with Midpen's operational requirements.

Environmental education and stewardship programs

OPWG emphasizes a "nature first" approach, with a major focus on environmental education and conservation efforts that align with Midpen's goal of protecting and restoring the natural environment. These programs could focus on teaching the public about land stewardship, native plant restoration, wildlife habitat preservation, and sustainable land use.

- **Conservation Workshops and Nature Walks:**

These events could provide opportunities for participants to learn about the ecology of the Bear Creek Stables area and how to contribute to preserving open space. Workshops on native plants, wildlife habitat restoration, and sustainable practices will be regularly offered to the community.

- **Habitat Restoration and Stewardship Volunteer Days:**

Volunteer programs would help to engage the local community in hands-on conservation efforts. Activities could include invasive species removal, trail maintenance, and native plant restoration, fostering a sense of ownership and responsibility for preserving the natural landscape.

- **Docent-Led Nature and History Tours:**

Trained Midpen docents could lead tours that explore the natural and cultural history of Bear Creek Stables and the surrounding landscape. These tours could focus on the local ecosystem, conservation efforts, and the history of equestrian activities in the region. Participants would gain a deeper understanding of how open space, equine activities, and nature conservation are interconnected.

- **Educational Outdoor Classroom:**

Developing outdoor classroom programs could serve as a learning space for both children and adults, offering hands-on education in areas such as environmental science, sustainable land use, and equestrian care. Programs could include workshops on native plants, wildlife habitats, sustainable horse care practices, and climate change education. The outdoor classroom programs could form an integral part of school field trips, youth programs, and community workshops, enhancing public understanding of the relationship between human activities and the environment.

Community and Corporate Engagement

To build strong ties with the community and corporate entities, the nonprofit could host events and service days that promote volunteerism, team building, and community involvement. These events could not only generate revenue but could also create opportunities for local groups to contribute to the upkeep of the property.

- **Corporate Volunteer Days:**

Corporate groups could participate in service days that focus on land conservation, stable

maintenance, and environmental restoration efforts, allowing companies to fulfill employee service hour requirements.

Community Open House Events:

Open house events could invite the community to explore the stables, learn about equine care, and participate in educational activities focused on conservation and sustainability.

Horsemanship Education

The nonprofit could offer a careful selection of equestrian programs designed to provide public access to horses and equine education while promoting responsible stewardship of the land. These programs could foster a connection between participants and nature, aligning with Midpen's mission of offering opportunities for public enjoyment in an environmentally sensitive manner.

- **Youth Camps and Education Programs:**

Seasonal youth camps could combine equestrian activities with environmental education, teaching children about horsemanship and conservation. These programs will foster an appreciation for nature and a connection to horses.

- **Groundwork and Horsemanship Clinics:**

Clinics focused on horse care, handling, and training without riding could engage participants in learning about horses while minimizing environmental impact.

- **Horse Riding Lessons:**

Limited riding lessons for all skill levels could be offered to the public, focusing on both riding techniques and responsible equine care, with an emphasis on environmental sustainability.

In addition to the nonprofit's lessons and clinics, professional equine instructors could rent stalls and offer their own style of horsemanship, therapeutic, or riding programs. Likewise, experienced equine program providers can rent stalls to establish their own satellite programs. These providers would be subject to defined insurance requirements, facility rules and facility fees.

Sample of Feasible Programs at Bear Creek Stables

Type of Program	Example of one	Characteristics of example	# of People per Event	Ages of Attendees	Staffing Type	First Phase of Program
educational hike	birding	guided hikes by local birding groups and observations of birds adapted to stables	5-15	adults	volunteer	0
horse/pony interactions	ambassador horse	gentle horse available to be observed and petted	5-15	school aged children to adults	volunteer	0
barnyard animals	goat petting pen	one or two goats in an enclosure	5-15	children	volunteer	1
pony co-op	pony co-op	several families support one or two ponies to be used for trail hikes and lead line riding	4-6	children	paid or volunteer	1
arts, crafts, movement, music	plein air painting class	local recreation center or painting clubs use stables/ houses as subjects	10-15	adults	paid staff to oversee group? (programs manager?)	0
circle-up	story telling circle	volunteer leads group in story telling	10-20	all ages	volunteer	0
large group uses	team building event	corporation uses facility to bring in employees and team builders	10-30	adults	programs manager?	2
school field trips	middle school science classes	public school children do nature related activities using modular programs developed	20-40	school aged children	volunteers (trained ahead of time)	0
equine demonstrations	farrier demo	local farrier demonstrates his/her profession	5-10	school aged children to adults	programs manager or other paid staff	0
guided stable tour	open house	volunteer leads group through boarding area	5-40	children to adults	volunteers (trained ahead of time)	0
environmental education	bat ecology	docent leads group to see bat houses (in the proper season)	5-10	school aged children to adults	volunteers or paid staff	0
riding clinic and horse shows	riding clinic	local trainer teaching riders their training methods	10-30	pre-teens to adults	trainers etc programming staff	0
elder tours	history of stables tour	volunteer gives a talk and short walk around stables	10-20	elders	volunteers	0
riding lessons	teaching basic riding skills	local trainer used their own horses to teach small group or individual lessons	1-5	all ages	trained instructors	1
adaptive riding lessons	teaching basic riding skills to riders with disabilities	Therapeutic horsemanship certified instructor provides riding lessons for riders with disabilities. If needed, volunteers as needed (horse leader, side walker(s) on horses trained specifically for program	1-4	all ages	trained instructors, volunteers	1
horse boarding	monthly fee for paddock	local horse owner rents paddock and uses trails and arenas	15-60	school aged children to adults	horse owners	0
equine wellness programs	teens with anxiety	small group of teens diagnosed with anxiety works with horses or farm animals	5-10	school aged children	trained programming staff	1
horse camps	summer riding camp	small group of children spend day at stables to learn riding and horse care	20	school aged children	paid staff including seasonal staff	1
parties	birthday parties	families use stables to celebrate child's birthday	20	families	staff to facilitate and monitor	1
vocational programs	BOX Ranch - vocational program	prepares neurodivergent young adults for school to work transition	5-10	young adults	trained programming staff	2

Additional 2 rows not shown.

Created with DataManager

APPENDIX E

An example of a phased model of implementing programs

As infrastructure is improved in phases 1 and 2, programs will expand to serve more diverse and underserved communities. The OPWG carefully considered how each phase of programming could grow alongside the physical and logistical enhancements to the facility, ensuring that Bear Creek Stables becomes a hub for nature-based public engagement while maintaining the foundational importance of a working horse stable.

Phase 0 aims to serve around 300 people annually with basic volunteer-led programs such as:

- **School visits** for preschoolers featuring nature hikes and animal interactions, aimed at local audiences using a group pay model, projected to serve 288 people annually.
- **Community service activities** like restoration and maintenance, targeting local high school students (grades 9-12) as volunteers.
- **Private events** for children (grades 1-5) and adult equine experiences (non-riding), both offered to the general public on a self-pay basis.

Recommended key elements for Phase 0:

- Small, controlled group sizes to accommodate parking limits and seasonal weather.
- Volunteer-led programs to reduce operational costs.
- Focus on non-riding equine experiences to make programs accessible and cost-effective.

Phase 1 includes all Phase 0 programs plus new additions, increasing total participation to above 700 annually:

- Expanded **school visits** for underserved students, with group pay or subsidy models.
- **Intro to horses** classes for grades 6-12, self-pay.
- **Midpen docent activities** focused on synanthropy (the relationship between humans and animals), offered to the general public as volunteer-led programs.

Phase 2 builds on previous phases, with total participation growing beyond 1,400 annually:

- **School visits** are extended to special needs groups, with a group pay or subsidy model.
- Larger public events, such as **open houses** and **Midpen Nature Center pop-ups**, engage the general public through donation-based or volunteer/staff-led programs.

Example of Community Participants Served by Programming Phase

Phase	Program	Goals served	Age	Audience	Revenue model	Participants per year
0	School visit: Nature hike & animal interaction	1,3,4	Preschool	Local	Group pay	
	Community service - restoration, maintenance	1,2,3	Grades 9-12	Local	Volunteer	
	Private events	3,4,5	Grades 1-5	General public	Self-pay	
	Adult equine experience (non-riding)	3,4,5	Adults	General public	Self-pay	
						288
1	Phase 0 programs plus:					
	School visit: Nature hike & animal interaction	1,3,4	Underserved	Group pay/subsidy		
	Intro to horses class	3,4,5	Grades 6-12	General public	Self-pay	
	Midpen docent activity - synanthropy	1,3,4	All	General public	Volunteer	
						720
2	Phase 1 programs plus:					
	School visit: Nature hike & animal interaction	1,3,4	Special needs	Group pay/subsidy		
	Open house	3,4,5	All	General public	Donate	
	Midpen Nature Center popup	1,3,4	All	General public	Volunteer, Staff	
						1,408

APPENDIX F

Midpen's operational requirements for Bear Creek Stables

3. Stables Management Guidelines

The following draft management guidelines will accompany a long-term lease for the stables to ensure a safe and healthy environment is provided for horses as well as a safe environment for equestrians and the general public visiting the site:

- *Maintain a horse capacity as close as possible to, but not exceeding, the 72 maximum allowed by the Santa Clara County Use Permit.*
- *Implement a manure management program that requires:*
 - *Paddocks be cleaned a minimum of once daily,*
 - *Manure must be stored in storage enclosures that will be covered during rain before off hauling, and drainage from storage enclosures must flow into vegetated filter strips.*
- *Develop, with tenant input, rules and regulations for maintaining a safe environment for visitors, riders and horses. Post the rules and regulations in prominent locations throughout the facility.*
- *Develop, with tenant input, rules and regulations for parking and/or storage of horse trailers and other mobile equipment related to the horse boarding operation.*
- *Require quarterly visual inspections and reporting of facilities and horses by a qualified animal husbandry practitioner to ensure safety and health of horses.*
- *Require tenant to establish emergency plans, including Emergency Animal Evacuation and Protection Plan, providing an emergency land line phone, and provision of basic medical first-aid provisions for humans and horses.*
- *Establish operating hours to be during daylight hours until adequate outdoor lighting is provided in riding arenas. In accordance to District ordinance, trail system will remain closed to users between dusk and dawn.*
- *Require tenants to provide a qualified on-site caretaker, subject to background checks and approval of the District.*
- *Require tenant to provide monthly reporting of activities, such as horse population, maintenance activities, incident occurrence, complaints, public access/education activities, etc.*
- *Require tenant to provide a public access plan, subject to District approval, outlining intent and planned methods of engaging the public in boarding, tours, education, clinics and other methods of public engagement.*

4. Public Access Programs and Improvements

To maximize public benefit of the site, a safe, welcoming and inclusive public access program will be implemented.

- *Designate public access areas as part of the Stables.*
- *Install a visitor kiosk or center with equestrian program brochures, interpretive information, and District standard signage, and offer public equestrian programs and horse boarding.*
- *Design and install monument signage at facility entry.*
- *Provide public restrooms and visitor parking.*
- *Designate a trail connection that would tie into the rest of the preserve's trail system as part of the Bear Creek Redwoods Open Space Preserve Plan.*
- *The District is considering permitting limited special events, such as group equestrian clinics, training events, small-scale equestrian demonstrations, and other equestrian-centric outdoor celebrations, to potentially facilitate partner funding for rehabilitation of the Bear Creek Stables site. The approval of events will be subject to compliance with the following limitations:*
 - *No amplified sound or music that could be heard beyond the boundaries of the event site would be permitted*
 - *A maximum of 250 attendees will be allowed per event.*

5. Maintenance and Operations Projects

Major maintenance and operations projects include the following:

- *Upgrade access roads to improve safety and reduce erosion.*
- *Improve and maintain roads and trails in accordance with District Road and Trail Inventory.*
- *Upgrade water system to provide adequate, reliable water supply.*

Source: Preserve Plan: Bear Creek Redwoods Open Space Preserve. January 2017.
Midpeninsula Regional Open Space District.

APPENDIX G

Phase 0: Profit and Loss Sample Budget

A phased budget approach will align with operational needs and site improvements. During **Phase 0**, the budget will focus on sustainable boarding operations and facilities management to lay the groundwork for public programming.

		Monthly Average	Annual
Revenue			
Boarding	30 stalls x \$700	\$21,000	\$252,000
Donations			
Events			
	TOTALS	\$21,000	\$252,000
Staffing			
Stable manager	0.5 FTE \$40/hr + 10% FICA/WC	\$3,520	\$42,240
AM feeders/cleaners	4hrs/day \$22/hr + 10% FICA/WC	\$2,710	\$32,525
PM feeders/dusk check	2hrs/day \$22/hr + 10% FICA/WC	\$1,355	\$16,262
Ranch hand/maintenance	10 hrs/month \$50/hr (contractor)	\$500	\$6,000
ADP Payroll Service	\$100 + ~\$9/employee - biweekly	\$254	\$3,048
Youth Volunteers AB 506	\$89/check + \$15/Training per volunt	\$312	\$3,744
	TOTALS	\$8,652	\$103,819
Operational Costs			
Feed	Hay/Alfalfa	\$4,500	\$54,000
Utilities	Water/Electricity	\$700	\$8,400
Manure disposal	Hauling and dump service fees	\$1,000	\$12,000
RTV loan payment	RTV initial cost of \$8,000	\$200	\$2,400
Fuel	For RTV		
Materials costs	E.g. Water trough parts, manure forks	\$300	\$3,600
Cell phone		\$100	\$1,200
Web hosting/marketing/Office supplies		\$200	\$2,400
Outreach branding (t-shirts)		\$300	\$2,600
	TOTALS	\$6,800	\$86,600
Insurance Costs			
General Liability	\$1M per occurrence, \$2M agg	\$100	\$1,000
Professional Equine	\$1M per occurrence, \$2M agg, CCC	\$375	\$4,500
Care, Custody, and Contre	\$50/horse	\$120	\$1,200
Commercial auto	\$1M	\$147	\$1,762
Workers compensation	\$1.45/\$100 in payroll	\$125	\$1,505
	TOTALS	\$867	\$9,967
Initial equipment costs			
RTV carts	2 carts (feed and manure)	\$400	\$400
Wheelbarrows	\$90 x 2	\$180	\$180
Signage	Arena rules, informational signs	\$500	\$500
	TOTALS	\$1,080	\$1,080
Midpen			
Rent			\$1
Maintenance fund		\$630	\$7,560
	TOTAL COSTS	\$18,029	\$209,027
	Net surplus	\$2,971	\$42,973

APPENDIX H

Examples of revenue sources

Below are examples of potential revenue sources that could support expanded programming at Bear Creek Stables.

1. Charter School Subsidies for Student Field Trips

Charter schools can provide an excellent funding opportunity for Bear Creek Stables through subsidies for student field trips. Schools such as the **Ocean Grove Charter School (OGCS)** offer funding specifically for educational field trips that align with their curriculum, which often includes nature education and hands-on learning experiences. Bear Creek Stables can partner with charter schools to offer field trips that focus on nature walks, equine interactions, and environmental education. These programs could bring in between **\$10,000 and \$50,000 annually**, depending on the scale and number of participating schools.

Charter school partnerships not only provide BCS with an additional revenue stream but also align with the objective of offering educational opportunities to underserved communities, promoting environmental stewardship, and fostering connections between students and the natural world.

2. Internship and Employment Subsidies

Another potential revenue stream involves accessing programs that subsidize employment for interns and workers at nonprofits like Bear Creek Stables. Programs such as the SARC (San Andreas Regional Center) initiative pay interns \$20 per hour to work onsite at businesses and nonprofit organizations. Bear Creek Stables could take advantage of this program to bring in interns who can assist with animal care, programming, and facility maintenance, while offsetting staffing costs.

By engaging interns through such programs, Bear Creek Stables can reduce its labor costs while providing valuable hands-on experiences for interns in environmental and equine management, further contributing to its mission of education and community involvement.

3. Corporate Volunteer Group Subsidies

Corporate volunteer programs can provide another stream of revenue by organizing volunteer days for teams from businesses that sponsor or subsidize employee service hours. Many companies encourage their employees to volunteer with local nonprofits as part of their corporate social responsibility efforts. Bear Creek Stables could partner with corporate teams to organize

community service days, such as site cleanups, facility improvements, and environmental conservation projects.

The **OGCS corporate volunteer program** offers subsidies for group activities, typically ranging from **\$2,000 to \$3,400 per group**. These corporate partnerships not only provide financial support but also strengthen community relationships and engage local businesses in the stables' mission.

ATTACHMENT B

SITE DESIGN, ARCHITECTURE, AND ENGINEERING
WORKING GROUP REPORT

Bear Creek Stables Site design, Architecture, Engineering



October 28, 2024

Committee members

**Bob Alexander
Mike Bushue
Zoya Girshfeld
Kent Knop
Melany Moore
Scott Simpson
Pamela Warren**



Executive Summary

The Site Design, Architecture, and Engineering (SDAE) working group identified significant costs savings, improved and efficient site design, safer circulation, preservation of cultural character, and opportunities for program efficiencies, all with fewer environmental impacts.

Closing the Stables would result in \$1,000,000 to \$2,000,000 in site restoration costs. SDAE believes that money can be put to better public use by retaining and improving Bear Creek Stables. The Stables, just as Alma College, can become an educational and interpretive asset for the community while telling the story of prior landowners.

SDAE concurs with the Operations and Programming group that, with some basic repairs and cleanup, many programs and boarders can return to make the Stables once again a viable respite from everyday travails, just as Midpen's other Preserves provide.

The SDAE working group was tasked with assessing the site layout, existing building reuse/replacement, and opportunities for cost efficiencies from the BCS repair plan presented to the Board on May 14. Early in its work, it was apparent that the group needed more broadly to determine the best overall site layout, infrastructure, and circulation to meet expanded, longer-term (10 years plus) program use for the Bear Creek Stables property. The working group gave priority to safety for humans and horses and respect for the ecological impact of continuing human use that extends back more than 100 years.

Throughout its work, the SDAE group was guided by the Midpen mission statement, Bear Creek Preserve Plan, and Bear Creek Stables Plan. The group also benefitted from a helpful working relationship with staff throughout the process.

The group was also committed to retaining the cultural character of the property, which represents an historic period in Bay Area history.

Recommended site layout: Maps labeled Vehicle Circulation Phase 0, Vehicle Circulation Phase 1, and Boarder Area Phase 1 present the recommended detail for the "lower" (often called the "program") area, the "upper" ("boarder") area, and the overall circulation including access from Bear Creek Road into and through both areas.

Table 1 shows the overwhelming agreement reached among staff, the Operations and Programming Working Group, and the SDAE on most line items; the table also indicates both identified and potential cost savings. The most significant are shown below.

Estimated savings:

\$1.5 million direct savings in Phase 1.

The largest immediate savings are:

- \$1,050,000+ by eliminating the need for concrete retaining walls originally proposed for the lower parking area (now relocated to the upper road) and residence (now relocated closer to the leach field);
- \$260,000 by using contractors through the non-profit (this is an example of comparing an estimate from the May 14 repair plan staff report to estimates obtained by the working group for the same work. This comparative estimated savings is anticipated to be replicated should a non-profit manage the construction.) Additional savings are

- expected by relocating source facilities sewer hook-ups to be more proximate to the treating leach field;
- \$195,000 by installing 3 smaller hay barns distributed throughout the site instead of a single large structure. Additional savings may result if fire sprinkling is not needed and if less water storage capacity is therefore needed.

An additional \$780,000 is deferred to Phase 2 for the Tevis Barn rehabilitation.

Alternative circulation/roads: The SDAE working group recommends an alternative for road design and circulation that substantially eliminates automobile traffic into the lower programming area and greatly enhances public safety. Only staff, maintenance, and ADA would have access. Most program-related parking would be re-located to near the entrance. Program drop offs and boarder traffic would be directed to the upper road and excluded from the active program use area. Turnaround for drop off and fire equipment would be in the transition area between the upper and lower levels.

This substantially improves safety for those using the program area. It also meets the suggested Fire Marshal road plan, a requirement that has previously delayed the conditional use permit. The recommended alternative location for a future caretaker residence and for ADA-compliant restrooms and parking allows for creative program re-use of the existing "casita," significantly reduces costs for sewer and water service, preserves a welcoming site for eventual restoration of the Tevis Barn, and creates a safer location for small-animal use in future programs.

The cost impact of proposed road realignment cannot yet be estimated because there is no fully engineered and estimated cost for creating a two-lane road in any location that complies with Fire Marshal requirements, either in the May 14 repair plan or developed by the SDAE. A final decision should include consideration of the substantial traffic and safety benefits of the SDAE proposal, as well as the route recommended by the Fire Marshal.

Alternative locations for ADA-compliant restrooms and parking, and for caretaker residence: Relocating these features to the area closer to the leach field will improve ADA proximity to anticipated assisted-program activity in the round pen and arena (which require special access), substantially reduces the cost by reducing the length and depth of trenching for sewer lines, and improves circulation and safety by limiting ADA and residence circulation in the lower area. It also restores viewing space to feature the Tevis Barn.

Phased development: The SDAE makes its recommendations in concert with the overall Ad Hoc decision to offer a multi-phase approach to implementing site improvements that allow increased public programs.

- Phase 0 enables reestablishment of public programs following site clean-up.
- Phase 1 includes most repair/replacement items in the original repair plan, with the exception of deferring any significant work on the Tevis Barn to a later phase.
- Some elements can be allocated to additional phases, consistent with the overall approach to fund raising and site improvements managed by a non-profit operator. By following the model of a managing non-profit to supervise construction of improvements, the SDAE, has reason to believe that capital costs can be reduced by at least 30% (based on a comparison estimate for the leach field as referenced above).

Expertise of the working group: The recommendations of the SDAE represent agreement among all members. Together they have more than:

- 97 years experience in field and electrical engineering
- 43 years in architecture and site design,
- 138 years of horse boarding experience (and more as horsemen and horsewomen),
- Additional experience in
 - project management,
 - commercial construction,
 - agricultural water supply/distribution design and installation, and
 - fire fighting.

Additional resources consulted: Members of the SDAE working group met or spoke with County officials, including the Fire Marshal, Health Department, and Planning and Building Departments, and Valley Water District. Members made PRA requests for and reviewed all submittals to the County from Midpen going back to 1990.

Members also met onsite with engineers, construction managers, and infrastructure specialty contractors of both local and national companies, all of whom generously offered their time and professional opinions. The SDAE team conducted numerous onsite field surveys and slope and distance studies, and we interviewed many experts to develop the recommendations offered in this report.

The proposed site plan and development phasing offers Midpen the opportunity to make improvements that support greater public access and a broad range of public programs while maintaining vestiges of an important historic period in history.

Site Design Architecture Engineering

Bear Creek Stables Ad Hoc Working Group Report October 28, 2024

Background

The Site Design, Architecture, and Engineering working group sought to improve site design, identify cost efficiencies, and enable a broad public use of Bear Creek Stables for future generations – an operation that has existed since it was originally put in place by Dr. Tevis over a hundred years ago. It was common at the time for the wealthy of San Francisco, such as Stanford, Flood, and Tevis, to build estates on the Peninsula because there was land that provided a quiet respite from city life and an escape from the cold summers in the City.

A common pastime of wealthy men in the late 1800's and into the early 1900's was owning, training and racing horses. Evidence on the land of this former way of life has largely disappeared over time. By preserving Bear Creek Stables, Midpen has an opportunity to continue at least the suggestion and remnants of this early tradition.

“Once part of the Alma Ranch, a sprawling tract in the Santa Cruz Mountains long owned by San Francisco's elite Flood and the Tevis families, the Bear Creek Stables complex encompasses a 1916 stable, an adjoining cottage/office, and a 1917 foreman's house. The Craftsman-style stable was built by Dr. Harry Tevis to house his prized Tennessee walking horses. Constructed by local contractor Harley Hoerler...the building is one of the best examples of its kind in the Santa Cruz Mountains.”

– Chris Ver Planck, historic preservation consultant

The Site Design, Architecture, and Engineering (SDAE) working group was guided by the Midpen Mission Statement, Bear Creek Preserve Plan, and Bear Creek Stables Plan. The group developed a plan that provides for sustainable community programming, retains the cultural character of the 1916 Stables, reduces costs for capital improvements and ongoing maintenance, respects the ecology of the site, enhances opportunities for environmental education, and provides for interaction between people and animals.

Altogether, the members of the Site Design, Architecture, Engineering group have 97 years' experience in field and electrical engineering, 43 years in architecture and site design, 138 years of horse boarding experience, and many years more as horsemen and horsewomen. They have experience in project management, commercial construction, and agricultural water supply/distribution – all of which has been used to develop the recommendations that follow.

I. Working Group Charter and Objectives

The Site Design, Architecture, and Engineering (SDAE) working group focused on the site layout and supporting utilities and infrastructure needed for expanded public access and educational use of Bear Creek Stables. All recommendations were developed to align with the Midpen Mission Statement, Bear Creek Preserve Plan, and Bear Creek Stables Plan.

The working group recognizes the importance of future repair and infrastructure development to support sustainable public access, retain the cultural character of the 100-year-old stables, enhance the ecological health of the site, and offer nature-based and environmental education programs.



The working group used the Repair Plan presented to the Board of Directors in May 2024 as its foundation. As the scope of proposed future program use became clear, the working group expanded the scope of site design to include the area traditionally called the “Boarder” or “Upper” area. Retaining this use both for

boarders and expanded educational programs has implications for circulation, fire prevention, water needs and distribution, and safety.

The working group has as its objectives:

- ❖ **Site efficiencies and safety:** The site must enable future programming use in a safe manner for both people and horses. Potential reuse, repurposing, and/or replacement of facilities must serve these needs. The recommended site design includes considerations of spatial adjacencies compatibility, efficiency and economy as well as environmental and historical concerns.

- ❖ **Cost savings:** Minimize to the extent feasible both infrastructure improvements and maintenance costs for Midpen and any future operator. Reduce the funding shortfall presented to the Board of Directors in May 2024 that was the main driver to forming the ad hoc committees. Identify areas for project cost reductions and improved efficiency through value engineering and alternative design.
- ❖ **Facility retention and/or restoration:** Preserve the unique character and historical character of BCS, a site that has been used as a horse facility for over 100 years. The future use can highlight this history, especially by retaining Features unique to BCS.
- ❖ **Compliance:** Recommendation must comply with the Bear Creek Preserve Plan and Bear Creek Stables Plan and with State and County building and other applicable codes, including Fire Marshal requirements.

II. Site Design, Infrastructure, Buildings, and Utilities Recommendations

These recommendations are the culmination of research and review of Midpen and regulatory documents, presentations, feedback from staff and the other working groups, extensive site visits, and consultation with professionals in subsystems and construction – many of whom visited the site and offered suggestions without compensation. The group focused on placing site infrastructure in more cost-effective locations that avoid waste, optimize the spaces available to be more compatible and allow flexibility and relevance to the various anticipated uses. Recommendations are presented here by element: Roads and Fire Equipment Access, Circulation, Site Design (structural and use), Water (potable and firefighting) and Electrical.

1. Roads and Fire Equipment Access

Challenge: Meet new road requirements to obtain a Conditional Use Permit that will allow other improvements and greater public use of the site while maximizing safety for both people and horses. Fire Marshal sign-off is needed. The proposed road design will meet Fire Marshal requirements and improve access and circulation for all users. (Note: recommendations and benefits for circulation that affect users are in the next section, “Circulation.”)

Recommendations:

- Make the upper road from Bear Creek Road down to the boarder area the preferred ingress and egress to the site.
- Improve 1150-foot section of road 2 lanes wide by cutting the uphill side, making the roadway 20 feet wide, plus 2 feet on each side as a shoulder .
- Maintain all roads beyond the “Y” as gravel.

- Use the uphill shoulder to divert any run off away from the hillside and to stabilize the lower area in the hopes of mitigating any need for changes to the existing retaining walls on the downhill slope.
- Maintain lower road as a single lane to service Caretaker's cottage, restroom, ADA and related parking.
- Maintain road that goes around boarding area for optional fire as well for turning semi-sized hay trucks turn around.
- Design the west side of the road around the border arena to collect and percolate water from the hillside and upper road. This may mean modifying the stalls in this area to have a known swale / wet area during the rainy season.
- Mitigation for tree removal for the road improvement should be done around the facility. An evaluation should be done to utilize volunteer resources to maintain the trees.
- For fire fighting, provide "Two Fire Attack Points"
 - 1st hydrant to be in the location of existing (non-operational) hydrant near Bear Creek Rd. = San Jose Water. This hydrant would have less volume and unlimited water amount.
 - 2nd hydrant to be at a proposed location to be plumbed into the proposed new water tank on the hillside (near Bat Houses). Hydrant will have a larger volume and limited water amount.

Benefits:

- The Fire Marshal suggested widening and using the upper road (see note in May 14 staff report). The proposed design, slightly modified from what was suggested, meets the Fire Marshal recommendation.
- The junction of the boarder level and the road to the lower Tevis area offers adequate turning area so that fire trucks could be staged at a proposed hydrant from the new tank/s. This area could also be used to stage delivery of hay from large semi-trucks to the appropriate locations.
- Roads presently are all less than 15% grade and can be maintained as gravel. Installing paving in an equestrian facility is not desirable due to the safety issues it introduces for horses to be walking on smooth surfaces.
- Compressed gravel is recommended over asphalt for safety, cost savings, and reduced environmental impact.
 - Safety – There are endless incidents of disastrous and fatal injuries of horses on asphalt paving surfaces. It also develops cracks and potholes that require heavy equipment to maintain.
 - Cost – Both labor and materials are less expensive and cheaper to install than asphalt paving. Maintenance requires minimal leveling and installation to cover depressions. Asphalt may require more expensive repairs. The EPA estimates that total cost of upkeep for a mile of paved road over six years is \$24,833 compared to \$18,065 for a mile of gravel road. (EPA study: When to pave a gravel road)

- Environment – Asphalt absorbs heat from the sun and releases it at night, contributing to heat island effect.
- The runoff is toxic and requires treatment. The installation makes smoke that can be harmful when inhaled.
- Use any dirt removed from the upper road cut back to raise and level the lower arena, fill in the area after ranch foreman Reginald Theobald caretaker's house is removed, and if any dirt remains, place in the area along the west side of the boarder area and to level out/reshape the area known as the dressage arena. (South area beyond the boarder area.) The retention of dirt on site not only eliminates hauling dirt offsite, but also eliminates or at least reduces the need to bring additional dirt onsite to make improvements. This reduces carbon usage, trip generation, and other impacts.

2. Circulation

Challenge: Boarders are consistent, almost daily, users. Program attendees are more seasonal and intermittent, and many are children. Provide circulation that meets the needs of both while improving safety in the program (“lower”) area and appropriate ADA access.

Recommendation: The road design described above provides greater safety for all users. Moving the parking originally shown in the Repair Plan as being in the lower area to being at the upper “Y” reduces traffic into the lower area. The Boarder group consists of everyday users – while the Program group includes more seasonal, intermittent, and mostly younger visitors. The proposed traffic flow ensures a safer, more orderly circulation pattern, while limiting the circulation-constrained lower area to maintenance, caretaker, and ADA access.



Benefits:

- Improves access and circulation for all users.
- The operator, Midpen maintenance, and ADA traffic will be the only traffic to the lower area, protecting the programming area from all but occasional vehicular traffic.
- ADA access via the lower road will allow proximate drop off for programs, access to ADA-compliant restrooms/parking, and immediate access to ADA-assisted facilities in the round pen and arena for equine-related programs.

- Boarders and program users doing drop-off will transit in/out through the upper road so planned increases in program use will not impact lower program area, further enhancing safety.
- All who access via the lower road will exit via the upper road, eliminating all but staff vehicle traffic in the roadway along the current “kiddie corral” and Tevis Barn, thus maintaining a vehicle-free zone for that program area.

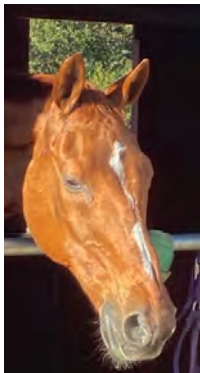
3. Site design

Challenge: To develop low impact, high value, and interpretive areas that allow greater public access and broad variety of public programs. Design should take advantage of the distinctive site conditions of terrain, sun exposure, and natural characteristics.

Recommendations:

Through multiple meetings of Ad Hoc working groups, Ad Hoc Board Members, and Midpen Staff, many solutions were developed and consensus opinions achieved where there had previously been differing opinions. These are summarized in Table 1. Among these are the decision to remove the large hay barn and “breezeway” barn, allowing for greater program area use (e.g. expansion of arena and round pen) and re-use of some elements of these barns.

Following are specific recommendations, integrated with benefits, that may require further investigation or do not have full consensus.



Hay barns: Distributed smaller barns (2-3) in separated locations allows for more flexibility and are more in keeping with modern horse keeping rather than a single large barn.

Benefits: Decreases cost and site impact, is safer than a single large barn, puts hay/feed closer to location use and thus improves operating efficiency, and reduces waste (lengthy storage in an oversized barn leads to stale and potentially moldy hay). Smaller barns do not require fire sprinklers which reduces infrastructure installation cost and water storage requirements.

“Casita”: If still in good structural condition (per property inspection report Oct. 2014) retain for program use, for instance, by altering roof to allow light.

Benefits: Repurpose for ecological programs, possible use as greenhouse for propagating native plants. Retains a unique construction technique (2-foot-thick concrete walls), retains cultural history, and avoids demolition and disposal of same.

Foreman’s residence: If chimney can be stabilized, demo remaining structure as planned, back-fill area and create generally flat surface for program use.

Benefits: Creates additional program space well away from other areas. Retains unique, local “river rock” feature. May serve as Stables entry element.

Caretaker residence (new) and ADA restrooms and parking: Locate near the leach field area.

Benefits: Substantial cost savings and improved site monitoring.

- Eliminates 300 feet of underground sewer line. Also eliminates the significantly deeper trenching otherwise required to develop the correct slopes of the sewer lines if brought from the Tevis Barn location proposed in the repair plan.
- The proposed location also offers the caretaker excellent visual access and monitoring of the Lower Area and is also within visual range of the Upper Roadway.
- A substantial L-shaped retaining wall is shown in the CUP plan as required behind the caretaker residence location in the repair plan. No retaining wall would be required in the SDAE recommended location, saving about \$350,000.
- By grouping these elements, there is more usable space/program area near the Tevis Barn, and it establishes a clear-view, focal point for the Tevis Barn. This space also allows for some more private or intimate programming and therapy space than if all programming area is combined into one large location as suggested by the programs group.

4. Water

Challenge: Midpen has begun improving the water supply by bringing potable water to the site. The installation has not yet been completed for the horse paddocks, and further extension of potable water to the program area is an essential part of the SDAE recommendations.

Recommendations and benefits: Presented here by the phased approach concurred with by the Ad Hoc committee.

Phase 0

– Extend water laterals from SJWC supply

Extend /repair existing supply to stalls and lower program area. Work on laterals would be limited primarily to 1) existing stalls and those repaired to serviceable condition, 2) program area, and 3) identified services areas including lower arena, etc.

– Water Holding (Test & Analyze)

At bridge crossing, perform pressure and CFF flow rate testing. Results are needed for design of any required fire sprinklers. Test results may reduce or eliminate the requirement for on-site holding.

If the SDAE recommendation for location/sizing of barns is accepted, ancillary structures would not trigger requirements for fire sprinklers until the 1916 Tevis

Barn is finally restored. Significantly, even if on site water holding is eventually required, we expect holding volume to be reduced by 50%.

Phase 1

– Complete final water distribution from SJWC supplied water. Extend, terminate and/or stub-out final water distribution in accordance with the Updated Repair Plan. Expected terminations will include Caretaker residence, ADA restrooms, water fountains, etc.

– Water Holding

Using test results from Phase 0, determine design options using only applicable structures. Working group estimates no more than 20,000 gal is required. Interconnection of tanks is allowable. For example, interconnecting 3-4 each 5000 gal tanks on a properly graded and compacted base would provide savings amounting to well over 50% of the installed cost estimated in the current Repair Plan based on a tank of 37,000 gallons, with on-site fabrication and expensive annular foundation. Additionally, 5000 gal tanks can be installed without permitting process.

5. Electrical

Challenge: Existing electrical service and distribution to the property and on the property is in poor condition and likely undersized for eventual program needs.

Recommendations:

Phase 0 - A new service pedestal, underground service cable, distribution boxes, and lighting are repairable in phase 0.

Phase 1 - Complete electrical including adequately lighting arenas and power improvements needed for new infrastructure (e.g. caretakers residence, ADA restrooms, leach field pump).

Conclusion

The SDAE working group has identified improved and efficient site design, safer circulation, opportunities for program efficiencies, preservation of cultural character, reduced infrastructure and operating costs, and opportunities for fewer environmental impacts.

Any decision by the Board to close the Stables carries a cost for site restoration of \$1,000,000 to \$2,000,000. SDAE believes that money can be put to better public use by retaining and improving Bear Creek Stables. SDAE concurs with the Operations and Programs group that with some basic repairs and cleanup, many programs and

boarders can return soon and make the Stables once again a viable respite from everyday travails just as Midpen's other Preserves provide.



Attachments:

SDAE Bios

SDAE Site maps:

Phase 0

Phase 1

Boarder Area

Table 1 SDAE Compare Infrastructure
(cost comparisons)



Site Design, Architecture, Engineering Ad Hoc Working Group **Professional and Technical Qualifications of Committee Members**

The Site Design, Architecture, and Engineering Working Group benefits from seven active members with exceptional, applicable experience in electrical engineering, field engineering, architecture, water systems, commercial construction, project management, and firefighting. All are long-time horse owners with varied boarding experiences.

In the aggregate the group has:

- 97 years' experience in engineering,
- 43 years in architecture and site design
- 138 years of horse boarding experience
- many years more as horsemen and horsewomen

Technical leadership for the key infrastructure and design elements are:

Mike Bushue, Road and Fire Protection Systems

- Avid equestrian, horseman since late 1960's.
- Retired Senior Staff Engineer: 40 years of design and project management experience
- San Mateo County parks trails system design and construction experience
- Volunteer fireman, Spokane County (including wildland firefighting)
- San Mateo County Large Animal evacuation group Board member
- Equestrian Trail Riders Action Committee (ETRAC) since 2005
- Involved in Bear Creek activities on behalf of ETRAC since 2014
- Trail advocate for over 20 years.
- Boarder at Webb Ranch for last 20 years

Pamela Warren, Site Design and Architecture

- Licensed Architect, State of California (1984)
- Majority of experience in the Design/Build sector for the past 29 years
- Senior Project Architect at Devcon Construction Inc. for 7 years (now retired)
- Extensive experience working with various local jurisdictions and the review processes needed to obtain approvals for projects such as BCS
- Architectural Advisor for the City of Campbell
- Lifelong horsewoman, having boarded horses at various locations throughout the Santa Clara and San Mateo Counties 45 years
- Horse Patrol Volunteer with Midpen, riding BCP trails and reporting through the Volunteer Portal
- Boarder, Bear Creek Stables, 7 years
- Los Gatos Resident

Bob Alexander, Water Systems

- Thirty years' experience as electrical engineer, and tradesman
- Past 10 years experience building and improving stables / barns, including agricultural water supply and distribution
- Currently expanding an equestrian facility near Summit Road and installing water supply/distribution systems in south Santa Clara County
- Open Space and Equestrian Advocate

Other members with relevant experience:

Melany Moore

- Retired Business owner 32 years, Campbell, CA
- Commercial owner/builder, Santa Clara County
- Contracting experience with Structural Engineering, Civil and General Construction companies
- Experience in equine-friendly landscaping, Pollinator Gardens, horse paddocks, composting facilities, and rainwater harvesting
- Board member, Friends of Bear Creek Stables, 10 years
- Board member, Summit Riders Horseman's Association, 18 years

Kent Knop

- Construction business owner
- Manure management and removal, Bear Creek Stables, 27 years
- Boarder, Bear Creek Stables, 28 years

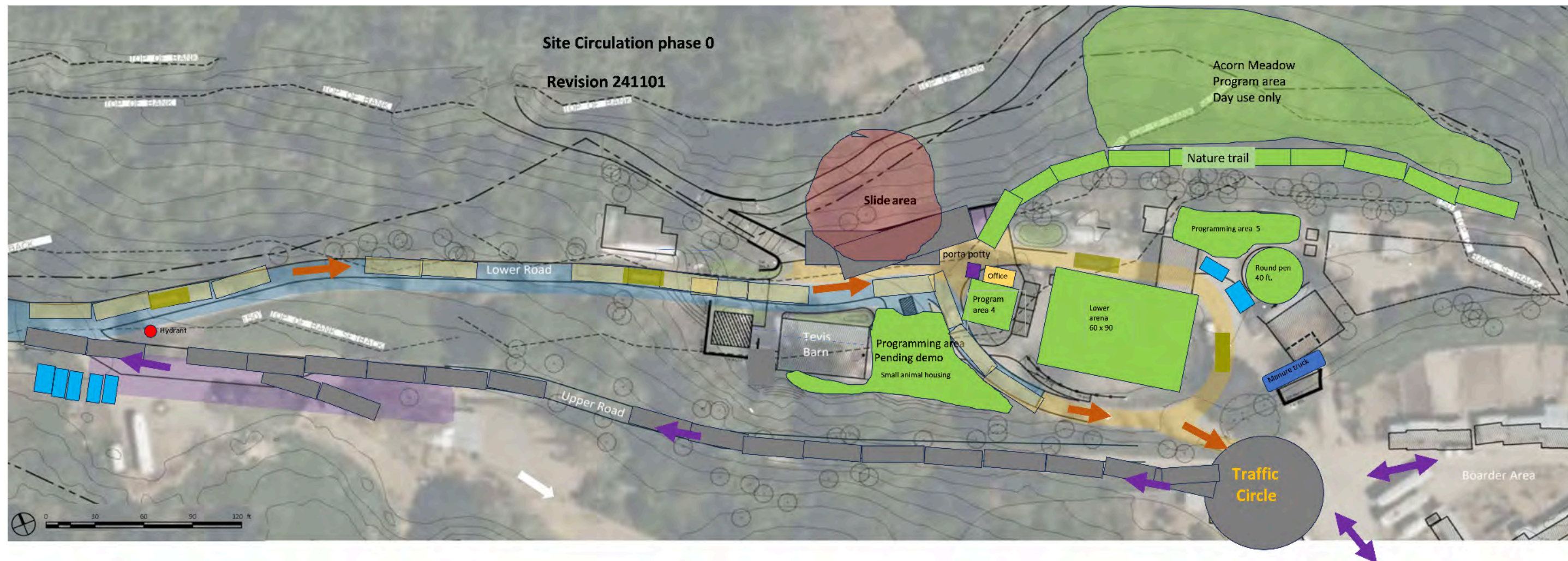
Scott Simpson

- Police Officer, Sunnyvale, CA
- Fireman, Sunnyvale, CA
- Boarder, Bear Creek Stables, 25 years

Zola Girshfeld

- Legal background
- Comprehensive knowledge of legacy water system, Bear Creek Stables
- Boarder, Bear Creek Stables, 10 years

Site Circulation / Site Plan - Phase 0



Site Circulation/ Site Plan – Phase 1

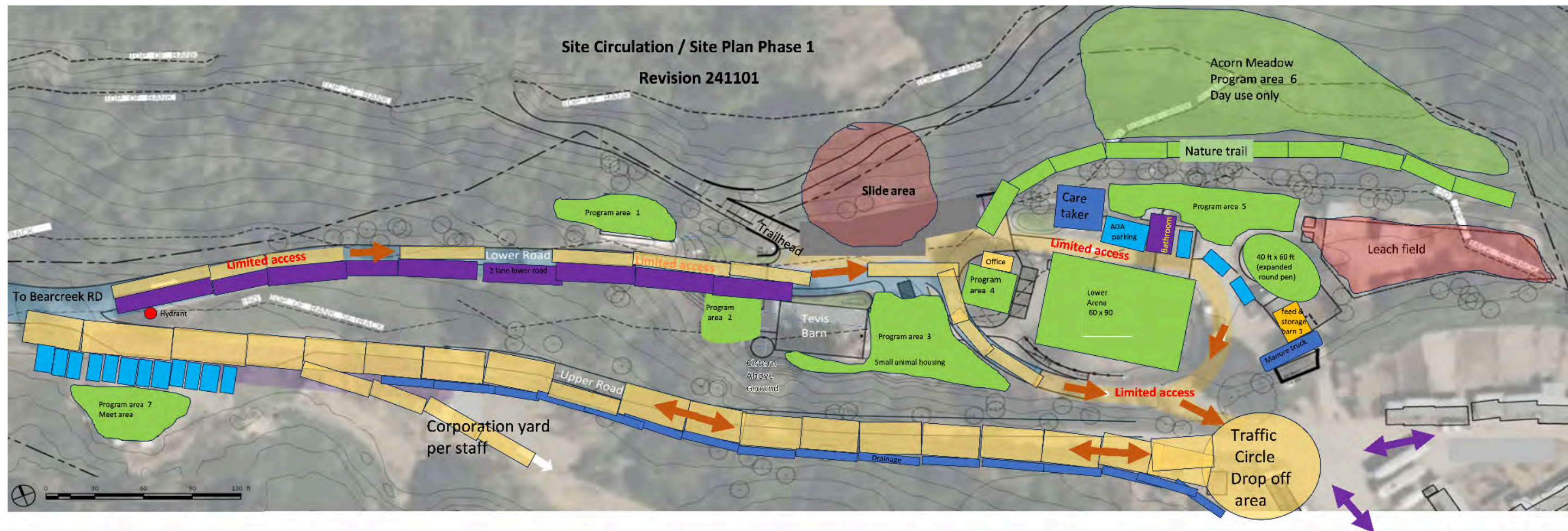


TABLE 1

	A	B	C	D	E	F	G
	Phase 0	Existing Structure/ improvement	Staff Repair Plan recommendation May 2024	Hybrid Staff - Ad Hoc Agree	Ad Hoc recommended alternative/addition	Benefit of Ad Hoc recommendation	Cost
1		Hillside drainage	N/A	Hillside Area drainage fix: existing paddocks			Unknown
2		Water line	N/A	Complete water line connections to paddocks			Unknown
3		Paddocks	N/A	Paddock improvements	Perform site grading and panel installation		Unknown Utilize volunteers and staff
4		Acorn Meadow	N/A	Low-impact path, tree stumps for seating, picnic tables			Unknown Utilize volunteers and staff
5		Dressage Area	N/A	Maintain existing program area			
6		Arena(s) Maintenance	N/A	Add additional sand and re-grade to improve drainage	Note: depending on how much sand used, may be counter to utilizing onsite cut fill to regrade arena		Unknown
7							

ATTACHMENT 4

	A	B	C	D	E	F	G
8		Site Cleanup	N/A	Site clean-up: Remove debris from previous caretaker, abandoned vehicle, and other debris from the site	Additionally, remove plastic storage sheds and abandoned contents, other misc cleanup as needed; perform misc painting on site such as at grooming shed		Unknown Utilize volunteers and staff Additional note: Promotes programming and investment quickly
9		Upper Road	N/A	Perform maintenance to the road (add rock) to allow winter use; provide road turnout areas if possible			Unknown. Pending Board approval for staff time and funding for contracting or construction materials
10					Install various shade structures to support program areas		Unknown Utilize volunteers and staff
11					Install small prefab office at Chinese Elm		Unknown
12							

	A	B	C	D	E	F	G
13	Phase 1	Existing Structure/ improvement	Staff Repair Plan recommendation May 2024	Hybrid Staff - Ad Hoc Agree	Ad Hoc recommended alternative	Benefit of Ad Hoc recommendation	Cost
14		Public Parking	13 parking spaces at lower road, required \$700k reaining wall	Relocate public parking from lower arena to near the "Y" or site entrance.			<u>\$700,000 savings</u> Lower road retaining wall eliminated; some stabiliation may be required at road Y
15		Foreman's cottage	Demolish	Demolish; evaluate Ad Hoc recommendation	Demolish but retain stone chimney, create programming platform	Retain heritage element; create additional program space	Cost not broken out Unknown
16		Goat pens, small stalls, tack room, kiddie corral	Demolish	Demolish			
17		Tevis Hay Barn "high-bay barn" additions	Demolish	Demolish			

	A	B	C	D	E	F	G
18		Casita	Demolish		Evaluate for unusual construction interest and for ecological and education use. <u>Not a rehabilitation proposal</u> , rather a creative space potential. Remove front wood additions.	Historical cultural construction example, 2' thick concrete walls deemed previously in sound condition. Ecological and/or programming space.	Cost not broken out Unknown
19		Grooming shed	No changes	No changes	Agree re: exterior and structure; minor interior modifications	Improves usability with proximity to arena	
20		Breezeway barn	Stabilize, new foundation, new roofs, new cladding	Remove. Allows better arena configuration	Remove, save original elements for reuse	Reuse of elements continues BCS historic character	
21		Lower rectangular arena	Modify	Modify	Agree; normalize rectangle at 60x90, possible future roof, remedy drainage		
22		Small Round Pen	No changes		Expand to oval		
23		Manure dump	Improve	Improve			
24		Upper Meadow Bat Houses	No change	No change			

	A	B	C	D	E	F	G
25		Round Pen Hay Barn	Stabilize, new foundation, new roofs, new cladding	Remove			
26		Hay Barn	New 2000 sq ft at upper road		2 - 3 @ 500 sq ft barns distributed near use Programming Ad Hoc concurs	Lower cost, better proximity to use, safer, less feed waste	\$350,000 installed \$65,000 x 3 = \$195,000 installed
27		Hay Barn	New 2000 sq ft barn fire sprinkler system required per County		2 - 3 @ 500 sq ft barns No fire sprinkler system required due to smaller size per County.		Cost unknown 500 sq ft barns=\$0
28		Caretaker residence	Build new caretaker residence where casita is currently, demo casita		New caretaker Tiny Home or similar residence near arena, leachfield to co-locate utilites. Agree with need, differ on location and cost	Eminimates need for 2 retaining walls at Casita location, security and habitable setting; keeps Tevis area as programming space; possibly Phase 2, using a trailer for Phase 1	\$ 280,000 + retaining wall @ \$350,000 = \$630,000 Range of \$167,000 to \$180,000

	A	B	C	D	E	F	G
29		Build ADA parking and Restrooms at Tevis	Build ADA parking and Restrooms at Tevis.		Locate ADA parking and restroom near arena, leachfield to co-locate utilites. Agree with need, differ on location and cost	Better use of program space and circulation; locate closer to leach field for cost and construction efficiency	Potential construction cost savings
30		Lower drive aisle	Refer to Repair Plan: pave asphalt to just above trail-head area		One lane compacted gravel		
31		Upper drive aisle	Refer plan per CUP application: paved to water tank 90' plus trailer parking, then unimproved		Widen for 2-way; compacted gravel.	Satisfies Fire Marshall; limits vehicular flow through Program area.	
32		Septic leach field	Install new leach field	Install new leach field			\$460,000
33	Phase	Tevis barn	Restore	Restore using donor funding			

	A	B	C	D	E	F	G
34	Timing TBD	Water Tank	30,000 gal		Consider 3 connected 5000 gallon tanks, which provides flexibility and potential for future water needs expansion		
35		Electrical service	Panels poorly placed and undersized				
36		Various bioswales	Install to capture, treat runoff		Agree, some modifications		
37							
38		Upper Boarder area.	Boarder area improvements		See SDAE Boarder area map		\$1,500,000 deferred 5/14
39		Boarder Parking			Boarders parking located within Upper Area		
40		Upper Arena	Upper Arena 120' x 220'		Improve with on-site excavated dirt	Unknown	

	A	B	C	D	E	F	G
41		Lower Arena			Add steel roof structure (covered arena); could also serve as solar panel location		

ATTACHMENT C:

FUNDRAISING AND PARTNERSHIPS
WORKING GROUP REPORT

**Bear Creek Stables
Funding and Partnership Working Group**

Funding and Partnership Strategy

Final Report

October 25, 2024

Bear Creek Stables – Funding and Partnership Working Group

Purpose

- Work with community members with experience in areas identified by the Board, including ... fundraising to explore and develop potential additional options for long-term stables operation
- Evaluate and present options for full Board consideration

Goals

- Identify potential private and public funding and partnership opportunities to support capital improvements and ongoing operations and programming
- Develop recommendations of funding and partnership strategies, along with the pros and cons of each strategy, based on operations/programming model(s) and improvements at the site recommended by the Operations/Programming Working Group and the Site Design, Architecture, and Engineering Working Group

Bear Creek Stables – Funding and Partnership Working Group

BC Stables Funding and Partnership Model

Deliverables

Funding and Partnership Strategy

- **Entity and Structure**
- **Approach**
 - Partnership Development
 - Funder Development
 - Community Development
- **Potential Partners and Funders**
- **Potential Funding Amounts and Timing**
- **Pros and Cons**
- **Recommendations**
- **Reference**

Bear Creek Stables – Funding and Partnership Working Group

BC Stables Funding and Partnership Model

Entity and Structure

Non-profit entity manages partnerships, funding, and community engagement

Non-Profit Entity 501(c)3 - Friends of Bear Creek Redwoods

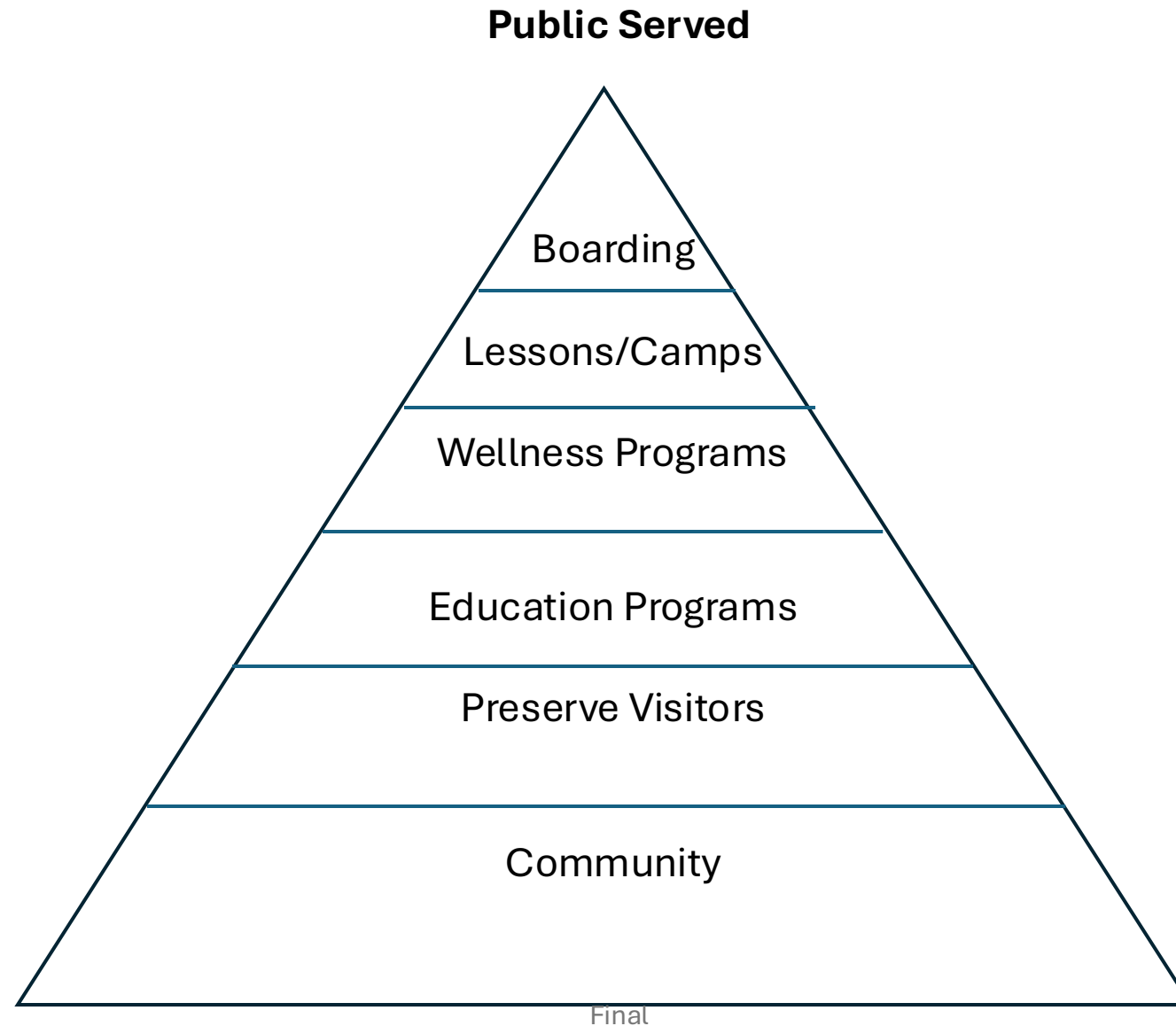
Responsibilities:

- *Interface with District*
- *Partner Development and Management*
- *Funding Development and Management*
- *Community Development and Management*
- *Stables Operations?*

Structure:

- *Director*
- *Staff (full and part-time, volunteers, third-party vendors)*
- *Boards (Oversight and Advisory)*

Bear Creek Stables – Funding and Partnership Working Group



Bear Creek Stables – Funding and Partnership Working Group

BC Stables Funding and Partnership Model

Approach

Partnership Development and Management

Partners utilize the stables infrastructure to offer a variety of programs and services to the public

Community

- *Awareness and support of BCR OSP and BC Stables*
- *Individual, community, and corporate visibility*

Preserve Visitors

- *Visitor area - information about stables and preserve*
- *Special events*

Education Programs

- *(Home) School groups, After school programs, STEAM, Native American culture*

Wellness Programs

- *Veterans, youth, Seniors, Physical & Mental Therapy, Corporate teambuilding*

Lessons, Camps, and Training

- *Riding lessons, animal care, nature education*

Boarding

- *Source of ambassadors, advocates, and volunteers*

Bear Creek Stables – Funding and Partnership Working Group

BC Stables Funding and Partnership Model

Potential Partners

	Phase 0 (Years 1-2)	Phase 1 (Years 3-5)	Phase 2 (Years 6-10)
Boarding	Boarders (20-30)	Boarders (30-50)	Boarders (50-70)
Lessons, Camps	Trainers (limited) Camps (limited)	Trainers Camps: after school, summer Horse behavior and use clinics	Trainers Camps: after school, summer Horse behavior and use clinics
Wellness		Equine-assisted therapy Therapist training VA therapy programs Corporate teambuilding	Equine assisted therapy Therapist training VA therapy programs Corporate teambuilding
Education		Local schools Home schools Boy/Girl Scouts 4H	Local schools Home schools Boy/Girl Scouts 4H

Bear Creek Stables – Funding and Partnership Working Group

BC Stables Funding and Partnership Model

Potential Partners (continued)

	Phase 0 (Years 1-2)	Phase 1 (Years 3-5)	Phase 2 (Years 6-10)
Preserve Visitors	Docents	Preserve & stables Information area Hikers and Birders Families Tabling at BCR Parking	Preserve & stables Information area Hikers and Birders Families Tabling at BCR Parking
Community	City Councils (information) Parks & Rec (information) Neighborhood focus groups On-line and media presence	Individual sponsors (members?) Corporate sponsors Horse Product sponsor In-person fundraising events	Venue Rental
Other		Public agencies Historical groups	Public agencies Historical groups

Bear Creek Stables – Funding and Partnership Working Group

BC Stables Funding and Partnership Model

Approach

Funding Development and Management*

Funders provide additional resources for operational and capital support of stables

Operational Funding

- Fees
- Scholarships

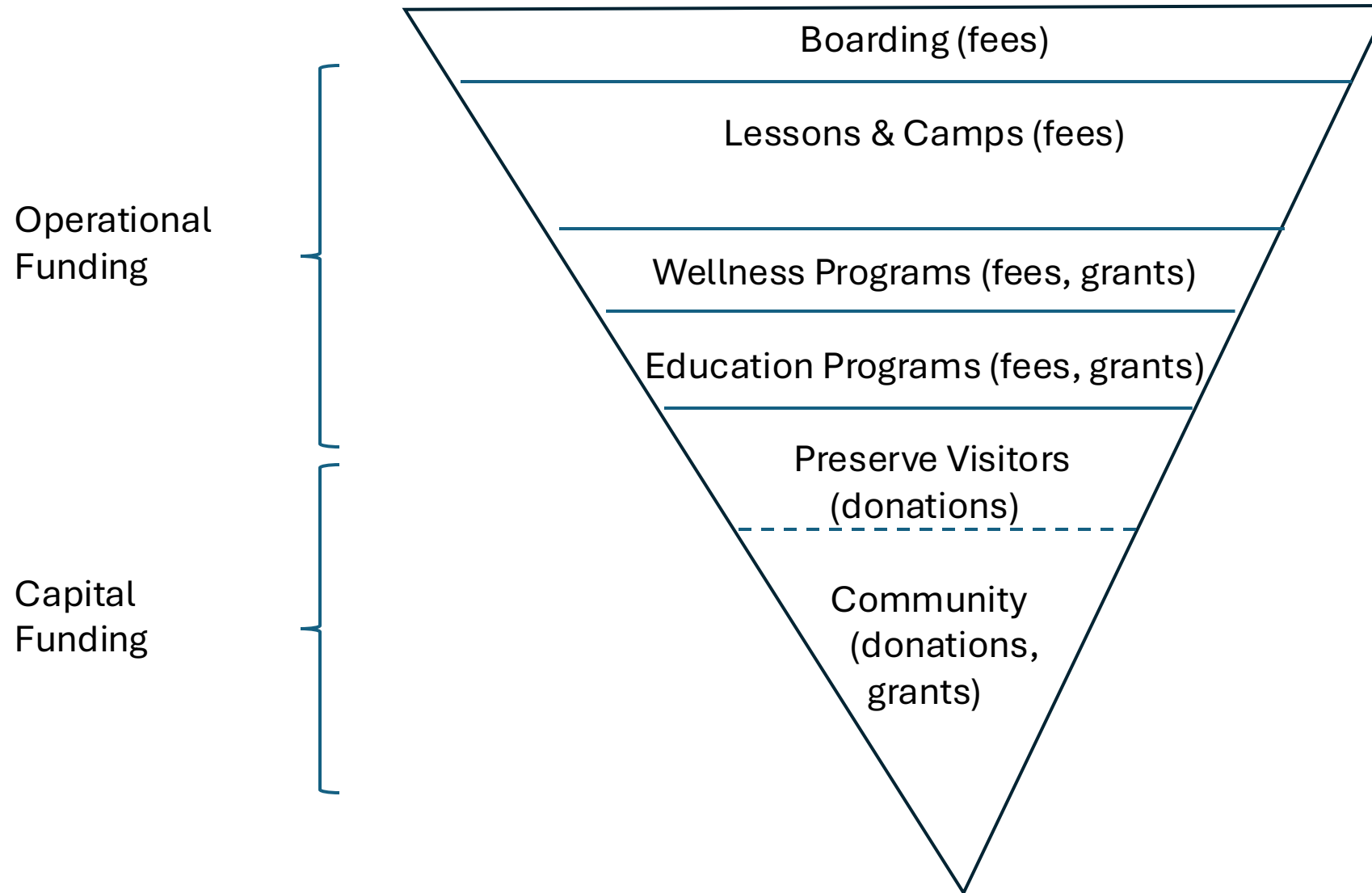
Capital Funding (infrastructure)

- Individual Donations
- Corporate Donations
- Public Grants (County, State, Federal) – Community Re-investment Programs
- Private Grants (Donor Advised Funds, foundations, individual)
- Events

** Fund raising consultant (short-term) or staff member (long-term) with assistance by volunteers*

Bear Creek Stables – Funding and Partnership Working Group

Potential Partners and Funding Sources



Bear Creek Stables – Funding and Partnership Working Group

BC Stables Funding and Partnership Model

Potential Funding Sources (per year)

	Phase 0 (Years 1-2)	Phase 1 (Years 3-5)	Phase 2 (Years 6-10)
Boarding	Boarding fees	Boarding fees	Boarding fees
Lessons, Camps		Lesson fees Camp fees	Lesson fees Camp fees
Wellness	Use Fees Grants	Use fees Grants Horse sponsors	Use fees Grants Horse sponsors
Education	Use Fees Grants	Use fees Grants	Use fees Grants
Preserve Visitors	Donations	Donations	Donations
Community	Service Groups/Pro Bono Memberships Living Room Sessions Social Media	Service Groups/Pro Bono Reinvestment Grants Gala, Barn Dance Corporate Sponsor/Match Memberships Living Room Sessions Equestrian Groups	Service Groups/Pro Bono Reinvestment Grants Gala, Barn Dance Corporate Sponsor/Match Memberships Living Room Sessions Equestrian Group Venue Rental

Bear Creek Stables – Funding and Partnership Working Group

BC Stables Funding and Partnership Model Potential Funding Amounts (per year)

	Phase 0 (Years 1-2)	Phase 1 (Years 3-5)	Phase 2 (Years 6-10)
Boarding	\$252,000	\$378,000	\$504,000
Lessons Camps	\$24,400	\$30,960	\$52,440
Wellness	\$10,000	\$245,400	\$410,400
Education	\$23,240	\$96,000	\$257,575
Preserve Visitors	\$10,500	\$22,500	\$37,500
Community	\$43,110	\$128,500	\$208,450
Total	\$363,460	\$901,960	\$1,470,365

Bear Creek Stables – Funding and Partnership Working Group

BC Stables Funding and Partnership Model

Approach

Community Development and Management

Community outreach to create awareness and support for stables as a community asset

Outreach*

- Story (why, what, and how) – a unique, historical, and valuable community asset
- Public agencies and corporate partnerships and donors
- In-person events with local and regional press coverage
- Active social media presence
- Link to other events

*Volunteer community outreach coordinator and team

Bear Creek Stables – Funding and Partnership Working Group

BC Stables Funding and Partnership Model

Pros and Cons

Pros

- Broad selection of activities and benefits for the community
- Comprehensive portfolio of funding sources
- Affordable and effective fundraising through a volunteer-centric approach
- Non-profit structure creates awareness and solicits/accepts donations, grants, etc.

Cons

- Multiple years required to ramp funding especially for capital projects
- Difficult to project sources and timing
- Cost/benefit of grants requires analysis and experience
- Reliant on non-profit's effectiveness (organization, staff, volunteers, etc.)

Bear Creek Stables – Funding and Partnership Working Group

BC Stables Funding and Partnership Model

Recommendations

- Based on 15 person-months of research and development by the FPWG who contacted over 60 organizations and individuals.
- There is a shortage of public equestrian facilities in the area. Support for a facility that provides nature-based, animal-assisted education and therapy appears to be strong.
- Programs (wellness, education, and community) utilizing the unique location within Bear Creek Redwoods OSP should be the primary mission. Boarding is offered primarily to support this mission.
- Non-profit structure allows focused partner and funder development and management while maintaining necessary separation from and close coordination with the District.
- Fundraising consultant leading a team of volunteers will be necessary to raise community awareness, create a partnership portfolio, and raise necessary funding.

Bear Creek Stables – Funding and Partnership Working Group

BC Stables Funding and Partnership Model

Recommendations (Continued)

- Partnership and funding strategy, goals, and implementation should be coordinated with phased approach for site structures, operations, and programming.
 - Funding checkpoint should take place at the end of Phase 0 (Year 2)
 - Grants management contractor should be considered in Phase 1
- Amount and timing of actual funding raised is difficult to predict. A ten-year time horizon is most realistic with large grants/donations expected in Phase 2.
- Community awareness is key. Compelling, inclusive, inviting, neighborhood-oriented, story-based communications will be required to build community support and attract necessary funding.
- An inviting and dynamic social media presence is critically important to meet awareness and fundraising goals.

Bear Creek Stables – Funding and Partnership Working Group

Reference Materials

Bear Creek Stables – Funding and Partnership Working Group

Funding Analysis

FPWG - Funding Analysis
10/23/24

Phase	Phase 0				Phase 1						Phase 2										
	1		2		3		4		5		6		7		8		9		10		
Year	Fees	Grants	Fees	Grants	Fees	Grants	Fees	Grants	Fees	Grants	Fees	Grants	Fees	Grants	Fees	Grants	Fees	Grants	Fees	Grants	
Wellness (SS)																					
USEF-SS		\$ 10,000		\$ 10,000		\$ 10,000		\$ 10,000		\$ 10,000		\$ 10,000		\$ 10,000		\$ 10,000		\$ 10,000		\$ 10,000	
AQHA						\$ 10,000		\$ 10,000		\$ 10,000		\$ 10,000		\$ 25,000		\$ 25,000		\$ 25,000		\$ 25,000	
Mustard Seed Corp. Groups					\$ 75,000		\$ 75,000		\$ 75,000		\$ 75,000		\$ 75,000		\$ 75,000		\$ 75,000		\$ 75,000		\$ 75,000
NCEFT					\$ 50,400		\$ 50,400		\$ 50,400		\$ 50,400		\$ 50,400		\$ 50,400		\$ 50,400		\$ 50,400		\$ 50,400
Subtotal	\$ -	\$ 10,000	\$ -	\$ 10,000	\$ 225,400	\$ 20,000	\$ 225,400	\$ 225,400	\$ 225,400	\$ 20,000	\$ 375,400	\$ 35,000	\$ 375,400	\$ 35,000	\$ 375,400	\$ 35,000	\$ 375,400	\$ 35,000	\$ 375,400	\$ 35,000	\$ 375,400
Education (MC)																					
Education-Marcie	\$ 3,420	\$ 20,000	\$ 3,420	\$ 20,000	\$ 66,600	\$ 30,000	\$ 66,600	\$ 30,000	\$ 66,600	\$ 30,000	\$ 207,575	\$ 50,000	\$ 207,575	\$ 50,000	\$ 207,575	\$ 50,000	\$ 207,575	\$ 50,000	\$ 207,575	\$ 50,000	
Subtotal	\$ 3,420	\$ 20,000	\$ 3,420	\$ 20,000	\$ 66,600	\$ 30,000	\$ 66,600	\$ 30,000	\$ 66,600	\$ 30,000	\$ 207,575	\$ 50,000	\$ 207,575	\$ 50,000	\$ 207,575	\$ 50,000	\$ 207,575	\$ 50,000	\$ 207,575	\$ 50,000	
Community (SS, PW, NC)																					
Gala/Barn Dance					\$ 15,000		\$ 15,000		\$ 15,000		\$ 20,000		\$ 20,000		\$ 20,000		\$ 20,000		\$ 20,000		\$ 20,000
Equestrian Groups		\$ 10,000		\$ 10,000		\$ 10,000		\$ 10,000		\$ 10,000		\$ 10,000		\$ 10,000		\$ 10,000		\$ 10,000		\$ 10,000	
Service Group					\$ 10,000		\$ 10,000		\$ 10,000		\$ 20,000		\$ 20,000		\$ 20,000		\$ 20,000		\$ 20,000		\$ 20,000
Reinvestment					\$ 20,000		\$ 20,000		\$ 20,000		\$ 40,000		\$ 40,000		\$ 40,000		\$ 40,000		\$ 40,000		\$ 40,000
Community		\$ 6,600		\$ 6,600		\$ 20,000		\$ 20,000		\$ 20,000		\$ 35,000		\$ 35,000		\$ 35,000		\$ 35,000		\$ 35,000	
Living Room	\$ 5,760		\$ 5,760		\$ 7,200		\$ 7,200		\$ 7,200		\$ 9,600		\$ 9,600		\$ 9,600		\$ 9,600		\$ 9,600		\$ 9,600
Pro Bono	\$ 4,800		\$ 4,800		\$ 7,200		\$ 7,200		\$ 7,200		\$ 14,400		\$ 14,400		\$ 14,400		\$ 14,400		\$ 14,400		\$ 14,400
Social Media	\$ 950		\$ 950		\$ 950		\$ 950		\$ 950		\$ 950		\$ 950		\$ 950		\$ 950		\$ 950		\$ 950
Corporate					\$ 3,150		\$ 3,150		\$ 3,150		\$ 3,500		\$ 3,500		\$ 3,500		\$ 3,500		\$ 3,500		\$ 3,500
Memberships	\$ 15,000		\$ 15,000		\$ 35,000		\$ 35,000		\$ 35,000		\$ 55,000		\$ 55,000		\$ 55,000		\$ 55,000		\$ 55,000		\$ 55,000
Subtotal	\$ 26,510	\$ 16,600	\$ 26,510	\$ 16,600	\$ 68,500	\$ 60,000	\$ 68,500	\$ 60,000	\$ 68,500	\$ 60,000	\$ 103,450	\$ 105,000	\$ 103,450	\$ 105,000	\$ 103,450	\$ 105,000	\$ 103,450	\$ 105,000	\$ 103,450	\$ 105,000	
Boarding (QPWG)																					
Boarding	\$ 252,000		\$ 252,000		\$ 378,000		\$ 378,000		\$ 378,000		\$ 504,000		\$ 504,000		\$ 504,000		\$ 504,000		\$ 504,000		\$ 504,000
Subtotal	\$ 252,000	\$ -	\$ 252,000	\$ -	\$ 378,000	\$ -	\$ 378,000	\$ -	\$ 378,000	\$ -	\$ 504,000	\$ -	\$ 504,000	\$ -	\$ 504,000	\$ -	\$ 504,000	\$ -	\$ 504,000	\$ -	\$ 504,000
Lessons/Camps (NC)																					
Lessons	\$ 400		\$ 400		\$ 960		\$ 960		\$ 960		\$ 1,440		\$ 1,440		\$ 1,440		\$ 1,440		\$ 1,440		\$ 1,440
Camps	\$ 24,000		\$ 24,000		\$ 30,000		\$ 30,000		\$ 30,000		\$ 51,000		\$ 51,000		\$ 51,000		\$ 51,000		\$ 51,000		\$ 51,000
Subtotal	\$ 24,400	\$ -	\$ 24,400	\$ -	\$ 30,960	\$ -	\$ 30,960	\$ -	\$ 30,960	\$ -	\$ 52,440	\$ -	\$ 52,440	\$ -	\$ 52,440	\$ -	\$ 52,440	\$ -	\$ 52,440	\$ -	\$ 52,440
Preserve Visitors (NC)																					
Visitors	\$ 10,500		\$ 10,500		\$ 22,500		\$ 22,500		\$ 22,500		\$ 37,500		\$ 37,500		\$ 37,500		\$ 37,500		\$ 37,500		\$ 37,500
Subtotal	\$ 10,500	\$ -	\$ 10,500	\$ -	\$ 22,500	\$ -	\$ 22,500	\$ -	\$ 22,500	\$ -	\$ 37,500	\$ -	\$ 37,500	\$ -	\$ 37,500	\$ -	\$ 37,500	\$ -	\$ 37,500	\$ -	\$ 37,500
Total	\$ 316,830	\$ 46,600	\$ 316,830	\$ 46,600	\$ 791,960	\$ 110,000	\$ 791,960	\$ 110,000	\$ 791,960	\$ 110,000	\$ 1,280,365	\$ 190,000	\$ 1,280,365	\$ 190,000	\$ 1,280,365	\$ 190,000	\$ 1,280,365	\$ 190,000	\$ 1,280,365	\$ 190,000	

Bear Creek Stables – Funding and Partnership Working Group

Reference Organizations

Equestrian Facilities & Organizations

- Friends of Huddart and Wunderlich Parks (Folger Barn)
- Horse Hill (Marin)
- Horse Park at Woodside
- Bay Area Barns and Trails
- Quicksilver Endurance Riding Club
- Santa Clara County Horseman's Association
- Los Gatos Equestrian Network
- Woodside Horse Owners Association
- Westwind Barn
- Hicks Creek Ranch
- Urban Cowgirl Ranch
- International Horsemanship Foundation
- California State Horsemen's Association

Community

- Town of Los Gatos, Town of Campbell, City of Monte Sereno
- Mountain Network News
- Loma Prieta Community Foundation, Education Foundation, and Women's Club
- Loma Prieta History Association
- Skyline Association
- Community Reinvestment Funds: Bank of America, Chase, Citibank, PNC Bank

Bear Creek Stables – Funding and Partnership Working Group

Reference Organizations (continued)

Education

- Little Farm (Tilden Park)
- Ardenwood Historic Park
- Lemos Farm
- Hidden Villa
- Sienna Ranch
- Emma Prusch Farm
- Jasper Ridge Farm
- Slide Ranch
- Deer Hollow Farm
- UC Elkus Ranch
- Visions in Education
- EPIC California Academy
- Northern California Homeschool Conv.

Bear Creek Stables – Funding and Partnership Working Group

Reference Organizations (continued)

Wellness

- Adaptive Sports Programs for Disabled Veterans and Disabled Members of the Armed Forces
- BOK Stables
- Square Peg Foundation
- National Center for Equine Facilitated Therapy
- Psynergy Programs
- DreamPower Horsemanship
- Horse Whispers
- AQHA Equine Therapy
- Nestldown
- One Step Closer Therapeutic Riding
- Ivybay Consulting

Businesses

- Equine: Platinum Performance
- Local: El Camino Health, Pinnacle Bank, Hotel Los Gatos Hotel, Toll House Hotel, KCAT TV
- Corporate Sponsor/Matching: Apple, Cisco, Intel, Alphabet, Meta, Netflix, LinkedIn, Salesforce

Bear Creek Stables – Funding and Partnership Working Group

Reference Organizations (continued)

Grants

- Bay Area Barns and Trails
- USDA Rural Enterprise
- Los Gatos Community
- MROSD More Pets and People Together
- American Youth Horse Council
- CA Department of Water Resource
- San Jose Grants for Nonprofits
- AQHA Foundation Awards 39 Equine-Assisted Activities & Therapies Grants
- Home for Horses Grants
- California Grant Watch, 122 Pets and Animal Wildlife Grants for CA
- Grants Gov/VA Equine 24 Equine Assisted Therapy
- Children Nature Network
- Silicon Valley Community Foundation
- Packard, Hewlett, and Moore Foundations
- Sand Hill Foundation
- National Park Service
- CA Department of Parks and Recreation
- Corporation for National and Community Service

Bear Creek Stables – Funding and Partnership Working Group

FPWG Work Plan

FPWG Members

Anne Black, Nancy Cole, Marcie Colonna, Suzanne Cornelius, Petra Wengler, Curt Riffle (Ad Hoc Committee)

Phase 1

June 26 to August 1: Explore and identify potential opportunities and approaches

- Education partnerships (Marcie)
- Health/therapy partnerships (Suzanne)
- Historic (Anne)
- Grant funding – (Petra)
- Local community - (Nancy)
- BC Stables community (Nancy)
- Equestrian community (Curt)
- Social media (Patrisha)
- Government Agencies (TBD)

Bear Creek Stables – Funding and Partnership Working Group

FPWG Work Plan

Phase 2

August 8 to August 29: Develop recommended strategy or strategies

- Continue to explore and identify opportunities
- Propose the fundraising and partnership entity and structure (i.e., Friends of BC Stables?)
- Develop the approach the entity would use to tap target funders and partners
- List potential target funders and partners including possible funding amounts and timing
- Develop an approach to building awareness and managing a funding campaign

Phase 3

September 5 to September 19: Refine strategy, list pros/cons, and develop recommendations

Phase 4

September 26: Present to Ad Hoc Committee

October 3 - 30: finalize FPWG strategy

Bear Creek Stables - Phase 0 and Phase 1 Site Design Cost Comparison Table

ATTACHMENT 5

Improvement	Repair Plan		Ad Hoc Plan			Modified Plan	
	Cost	Staff comments	Cost	Ad Hoc proposal	Staff comments	Cost	Staff comments
PHASE 0							
Hillside drainage repair	\$ -	NA	\$ 4,200	Hillside area drainage fix: existing paddocks	Scope of work includes: 1) Layout earthen trench location along the base of the hillside 2) Utilize a JD excavator to install a ~ 480 linear foot earthen trench	\$ 4,200	Agree, staff can perform minor drainage work
Water line	\$ 58,520	Work was planned/ongoing prior to May 14 Board direction	\$ 58,520	Complete water line connections to paddocks	Scope of work includes: 1) Trench new lateral lines from Cristy boxes to a set of paddocks 2) Trench a "T" in front of each set of newly installed paddocks 3) Install new Schedule 40 pipe and valves 4) Test for leaks and bury new piping 5) Connect stubbed pipes to each paddock 6) Install new water troughs 7) Install new water floats 8) Connect new floats to water line, flush system and fill water troughs (Connects all 56 paddocks to new water line)	\$ 58,520	Agree, staff can connect water line to paddocks
Paddocks	\$ 16,000	Work was planned/ongoing prior to May 14 Board direction	\$ 16,000	Paddock improvement/perform site grading and panel installation. Utilize volunteers and staff	Scope of work includes: 1) Install and compact base material at 19 pre-existing paddock locations 2) Install pipe panels previously used at Hicks 3) Install rubber stall pads(No Plans to improve existing 37 paddocks)	\$ 16,000	Agree, staff can install pipe panels and paddocks
Acorn Meadow	\$ -	NA	\$ 14,500	Low-impact path, tree stumps for seating, picnic tables. Utilize volunteers and staff.	Scope of work includes: 1) two picnic tables \$7000, 2) vegetation and site clean-up and tree stumps \$5300, and 3) low impact trail \$2200	\$ 5,300	Agree with placement of tree stumps for informal seating and allow for very low-intensity use area. Staff do not support new permanent picnic tables that could result in higher intensity use resulting in new resource impacts. Scope of work includes: 1) Cutting down weeds and grass 2) Removing debris and other tripping hazards 3) Limbing up tree branches, and 4) Cutting and installing tree stumps for sitting
Dressage area	\$ -	NA	\$ 1,800	Maintain existing program area	Scope of work includes: 1) Cutting down weeds and grass 2) Removing debris and other tripping hazards 3) Limbing up tree branches 4) Repairing road leading from upper arena down to dressage area	\$ 1,800	Agree, staff can conduct maintenance in program areas

Bear Creek Stables - Phase 0 and Phase 1 Site Design Cost Comparison Table

ATTACHMENT 5

Improvement	Repair Plan		Ad Hoc Plan			Modified Plan	
	Cost	Staff comments	Cost	Ad Hoc proposal	Staff comments	Cost	Staff comments
Arena(s) maintenance	\$ -	NA	\$ 15,000	Add additional sand and re-grade to improve drainage (Note: depending on how much sand is used, may be counter to utilizing onsite cut/fill to regrade arena.)	Scope of work includes: 1) Ripping existing sand and preparing surface for new sand 2) Spreading delivered piles of sand 3) Re-leveling entire arena 4) Administrative time to order and process invoice. Note: Cut/fill will not be available until earliest 2027 as part of Phase I work.	\$ 15,000	Agree, staff can complete arena maintenance
Site cleanup	\$ 12,000	Work was planned/ongoing prior to May 14 Board direction	\$ 12,000	Site clean-up: Remove debris from previous caretaker, abandoned vehicle, and other debris from the site. Additionally, remove plastic storage sheds and abandoned contents, other misc. cleanup as needed; perform misc. painting on site such as at grooming shed. Utilize volunteers and staff. Additional note: promotes programming and investment.	Scope of work: 1) Order approximately six (6) 40 yard dumpsters to arrive consecutively 2) Fill dumpsters with debris 3) Remove old truck from hay barn	\$ 12,000	Agree, staff can complete site cleanup
Upper road	\$ -	NA	\$ 33,600	Perform maintenance to the road (add rock, etc.) to allow winter use; provide road turnout areas if possible. Pending Board approval for staff time and funding for contracting and/or construction materials.	Scope of Work: 1) Grade and shape existing base surface to remove ruts and improve drainage 2) Add Class II AB and spread to harden surface 3) Water and compact the spreaded AB material	\$ 33,600	Agree, staff can complete maintenance to the upper road to allow winter use
Shade structures	\$ -	NA	\$ -	Install various shade structures to support program areas (confirmed E-Z Up like structure)	Staff confirmed Ad Hoc FWG proposal is for temporary, portable shade structures, e.g. E-Z ups.	\$ -	Agree, staff support use of portable, temporary shade structures, e.g., E-Z Ups
Office	\$ -	NA	\$ 10,000	Relocate existing shipping container/office to Lower Arena.	District owns shipping container / office, and assumes that it can be relocated at minimal cost.	\$ -	Use container office in existing location

Bear Creek Stables - Phase 0 and Phase 1 Site Design Cost Comparison Table

ATTACHMENT 5

Improvement	Repair Plan		Ad Hoc Plan		Modified Plan		
	Cost	Staff comments	Cost	Ad Hoc proposal	Staff comments	Cost	Staff comments
PHASE 1							
Access Road - Bear Creek Road to the Y	\$ 489,000	Emergency access along lower road 24' (Bear Creek Rd to Y). Includes grading, paving, and tree removal.	\$ 489,000	Emergency access along lower road 24' (Bear Creek Rd to Y). Includes grading, paving, and tree removal.		\$ 489,000	Emergency access along lower road 24' (Bear Creek Rd to Y). Includes grading, paving, and tree removal.
Access Road - Y to Lower Arena	\$ 785,000	Emergency access along lower road 24' (Y to Lower Arena). Includes grading, paving, tree removal, and retaining wall.	\$ 100,000	Ad Hoc plans call for one way, gravel, access on the lower road. One lane compacted gravel.	Assumes that no widening of lower road will be required and that fire access via upper road is sufficient, per conversation between Ad-Hoc Working Group members and County Fire Department. District was not present, and will confirm. Costs assumes that only minimal grading and rocking improvements will be required to facilitate ADA, delivery, staff, and pedestrian traffic.	\$ 785,000	Staff support emergency access along lower road 24' (Y to Lower Arena). Includes grading, paving, tree removal, and retaining wall.
Access Road - Y to Upper Arena	\$ -	NA	\$ 1,150,000	Ad Hoc plan calls to widen for two-way compacted gravel. ("Y" to upper arena)	Emergency access along upper road 24'. Significant grading and retaining walls. Cost includes grading, retaining walls at upslope (7' avg) and downslope (5' avg). Includes rocking but no paving. No offhaul of soil, transport to onsite location and minor grading. Note: Increased ongoing operational maintenance costs associated with areas improved with gravel vs. paving.	\$ -	Staff does not support use of the upper road for two-way emergency access (24') in Phase 1. Could be considered adding to Phase 2 as external funds are secured and operational needs are confirmed.
Public Parking and Paving	\$ 380,000	13 parking spaces at lower arena area. Cost of retaining wall is included in site grading and retaining wall line item.	\$ 150,000	Relocate public parking from lower road to near "Y" or site entrance.	Cost includes grading and paving for parking at "Y"	\$ 150,000	Staff support relocating public parking from the lower arena area to the "Y"

Bear Creek Stables - Phase 0 and Phase 1 Site Design Cost Comparison Table

ATTACHMENT 5

Improvement	Repair Plan		Ad Hoc Plan		Modified Plan		
	Cost	Staff comments	Cost	Ad Hoc proposal	Staff comments	Cost	Staff comments
Site (and Parking) Grading and Retaining Walls	\$ 700,000	Grading and retaining walls for lower arena area including parking, manure dump, caretaker residence.	\$ 653,000	Relocate public parking from lower road to near "Y" or site entrance. Retain casita and existing casita retaining wall.	\$700,000 repair plan estimate included lower parking grading and retaining wall (\$477K), caretaker residence retaining wall (\$150K), and manure dump retaining wall (\$73K). \$247,000 of \$477K saving for parking area retaining wall at lower arena, \$230K of \$477K remains for stabilization of hillside at original parking location. \$200,000 added for hillside stabilization for parking at "Y". Note: consultation with County confirmed that retaining wall adjacent to casita will need to be brought to code therefor \$150K for caretaker retaining wall remains.	\$ 653,000	\$247,000 saving for parking area retaining walls at lower arena, \$200,000 added for hillside stabilization for parking at Y, \$150,000 for casita retaining wall remains in the cost
Trail Connection	\$ 168,000		\$ -	Defer to Phase 2		\$ -	Staff supports deferring trail connection improvements to Phase 2.
Breezeway Barn	\$ 20,000	Demolish	\$ 20,000	Demolish. Retain elements for reuse.	Minimal anticipated cost increase.	\$ 20,000	Staff support demolition of Breezeway Barn and retaining elements for reuse.
Hay Barn	\$ 370,000	Demolish and replace with new hay barn along upper road near "Y".	\$ 160,000	2-3 @ 500 sq ft barns distributed near use. Better proximity to use, safer, less feed waste.	Cost includes 3 small barns installed, including pad preparation. Assumes prefab steel at 500 sq ft and that County will not require fire suppression system.	\$ 160,000	Staff support multiple, small, dispersed barns if fire sprinklers are not required due to size. May result in increased operational costs associated with hay delivery.
Caretaker Residence	\$ 280,000	New prefab residence at casita/cottage location.	\$ 280,000	New caretaker Tiny Home or similar residence near area and leach field to co-locate utilities. Agree with need, differ on location and cost	Cost savings of \$55,000 related to co-locating utilities shown in Sewer/Septic/Leachfield (shared with restroom).	\$ 280,000	Staff do not support installation of a new caretaker residence on the north side of the lower arena. Staff support the new caretaker residence at the Casita location. Cost for associated retaining wall and utilities are accounted for in Site (and Parking) Grading and Retaining Wall and Sewer/Septic/Leachfield line items.
Tevis Main Barn	\$ 825,000	Repair main barn. Demolish accessory structures at east end of barn.	\$ 50,000	Defer main barn repairs to Phase 2. Phase 1 includes minor structure protection and demolition of "high-barn addition and adjacent goat pens, small stalls, tack room, kiddie corral.	Cost include structure protection to slow further deterioration.	\$ 50,000	Defer Main Barn repairs to Phase 2. Phase 1 includes minor structure protection and demolition of "high-barn" addition and adjacent goat pens, small stalls, tack room, and kiddie corral.
Restroom	\$ 130,000	New restroom adjacent to Tevis main barn.	\$ 130,000	Locate (ADA parking and) restroom near arena, leachfield to co-locate utilities. Agree on need, differ on location and cost	Cost savings of \$55,000 related to co-locating utilities shown in Sewer/Septic/Leachfield (shared with caretaker residence).	\$ 130,000	

Bear Creek Stables - Phase 0 and Phase 1 Site Design Cost Comparison Table

ATTACHMENT 5

Improvement	Repair Plan		Ad Hoc Plan			Modified Plan	
	Cost	Staff comments	Cost	Ad Hoc proposal	Staff comments	Cost	Staff comments
Pedestrian Paving	\$ 125,000		\$ 125,000			\$ 125,000	
Equestrian Amenities	\$ 178,000		\$ 178,000			\$ 178,000	
Water System Completed to Date	\$ 415,000		\$ 415,000			\$ 415,000	
Water System Remaining	\$ 760,000		\$ 740,000	Consider 3 connected 5000 gallon tanks which provide flexibility and potential for future water needs expansion	Smaller tanks will result in some savings reflected in the cost estimate. Although concrete pads will still be required. Consultation with the County confirmed that all water needs to be installed as part of Phase I.	\$ 760,000	Staff recommends one larger water tank be constructed in Phase I for ease of maintenance and less potential of appurtenance failure.
Boarder Area	\$ 1,500,000		\$ -	Defer to Phase 2, See SDAE Boarder Area Map in <i>Bear Creek Stables Ad Hoc Committee Summary Report and Recommendations, dated November 4, 2024</i> .		\$ -	Staff support deferral of boarder area to Phase 2.
Demolition/Clearing and Grubbing	\$ 200,000		\$ 200,000			\$ 200,000	
Drainage/Treatment (C3)	\$ 460,000		\$ 510,000		Due to increased impervious surfaces associated with additional road improvements, additional stormwater treatment will be required by County.	\$ 460,000	
Sewer/Septic/Leachfield	\$ 460,000		\$ 405,000	Install new leach field. \$55,000 savings in sewer line reduction		\$ 460,000	
Electrical	\$ 190,000		\$ 190,000			\$ 190,000	
Mitigation and Restoration Planting	\$ 550,000	Note: Cost may be reduced if volunteers are utilized to complete work.	\$ 695,000		Upper road improvements, even when considering reduction of lower road improvements will result in net increase in impacts. Note: Cost may be reduced if volunteer are utilized to complete work.	\$ 550,000	Note: Cost may be reduced if volunteers are utilized to complete work.
Other Permit Conditions	\$ 100,000		\$ 100,000			\$ 100,000	
Foreman's cottage (Caretaker Residence north of lower road)	\$ -	Demolish. Cost of demolition included in <i>Demolition/Clearing and Grubbing</i> .	\$ 170,000	Demolish, evaluate Ad Hoc recommendation to retain stone chimney, create programming platform.	Cost include chimney and fire place stabilization, grading, hillside stabilization and platform construction. Assumed replacement and reuse of 50% of existing brick plus hand placement of bricks and mortar	\$ -	To limit project cost increases, staff do not support retaining Foreman's Cottage chimney/fireplace and creation of programming platform.
Cottage/casita (west of Tevis/Main Barn)	\$ -	Demolish	\$ 200,000	Evaluate for unusual construction interest and ecological and education use. Not a rehabilitation proposal, rather a creative space potential. Removal of front wood additions.	Consultation with the County confirmed that casita will be reviewed as a new structure and must meet Building Code based on use classification.	\$ -	Modification of Casita is not supported by staff. Staff recommend new Caretaker Residence in Casita footprint. Costs are shown in <i>Site (and Parking) Grading and Retaining Wall and Caretaker Residence</i> .

Bear Creek Stables - Phase 0 and Phase 1 Site Design Cost Comparison Table

ATTACHMENT 5

Improvement	Repair Plan		Ad Hoc Plan			Modified Plan	
	Cost	Staff comments	Cost	Ad Hoc proposal	Staff comments	Cost	Staff comments
Grooming shed	\$ -	NA	\$ 10,000	Minor interior modifications	\$10,000 placeholder for interior modifications pending confirmation of specific improvements.	\$ -	
Lower rectangular arena			\$ 132,000	Normalize to rectangular 60x90, possible future roof, remedy drainage	Includes cost to improve to 60' x 90' rectangle, grading, fencing, footage and improve drainage. Roof deferred to Phase 2.	\$ 132,000	
Small round pen at lower arena			\$ 35,000	Expand to oval	Grading, footing improvements for approximately 1250 sq ft, and 125 linear ft of fencing.	\$ 35,000	
Small animal enclosure	\$ -		\$ 30,000	Recommendation from programming ad hoc.	Cost includes two 120 sq ft animal shelters (grading, concrete pad) and fenced enclosures.	\$ 30,000	Staff support infrastructure when funding is secured.
GC/Mobilization/Site Preparation	\$ 400,000		\$ 400,000			\$ 400,000	

Bear Creek Stables - Phase 0 and Phase 1 Site Design Cost Comparison Table

ATTACHMENT 5

Improvement	Repair Plan		Ad Hoc Plan			Modified Plan	
	Cost	Staff comments	Cost	Ad Hoc proposal	Staff comments	Cost	Staff comments
Phase 0 Total	\$ 86,520		\$ 165,620			\$ 146,420	
Phase 1 Subtotal	\$ 9,485,000		\$ 7,717,000			\$ 6,752,000	
Construction Contingency (10% of total)	\$ 948,500		\$ 771,700			\$ 675,200	
Phase 1 Total	\$ 10,433,500		\$ 8,488,700			\$ 7,427,200	
Phase 0 and 1	\$ 10,520,020		\$ 8,654,320			\$ 7,573,620	
Cost escalations	<i>Future year costs projected with 6% annual escalation. For cost estimating purposes only, Phase 0 is assumed to be completed in 2025 and Phase 1 is anticipated to start in 2027.</i>						
Additional costs not included above							
Soft costs*	\$ 450,000		\$ 500,000			\$ 450,000	
<i>* Separate from capital construction costs, the District has incurred \$755,000 in consultant costs to date (feasibility studies, designs, permit application preparation). The soft costs indicated would be needed to complete the Project (final plans, as-builts, construction administration, and, if needed, additional assessments and studies such as geotechnical, structural, and biological).</i>							

Improvement	Repair Plan		Ad Hoc Plan			Modified Plan	
	Cost	Staff comments	Cost	Ad Hoc proposal	Staff comments	Cost	Staff comments
PHASE 2							
Main barn	\$ -	Repairs completed in Phase I	\$ 1,104,036	Repair using donor funding		\$ 1,104,036	Staff support deferring to Phase 2 with minor structure protection only completed in Phase 1.
Water tanks	\$ -	Permit condition improvement completed in Phase 1.		Consider 3 connected 5000 gallon tanks which provide flexibility and potential for future water needs expansion	Consultation with the County confirmed that all water needs to be installed as part of Phase I.	\$ -	Staff recommended completing the full water system in Phase 1 to provide maximum fire safety as advised by County Fire Marshal. Additionally, staff recommend use of one large tank vs. multiple small tanks to reduce ongoing maintenance associated with multiple water connections.
Boarder area	\$ -	Completed in Phase 1.	\$ 2,007,338	Includes boarders parking located within Upper/Boarder Area		\$ 2,007,338	Staff confirmed that it is feasible to defer Boarder Area improvements to Phase 2 with only minor Paddocks improvements in Phase 0. Note: Staff recommend that boarder area improvements including drainage are prioritized over other phase 2 improvements.
Trail connection	\$ -	Completed in Phase 1.	\$ 224,822			\$ 224,822	Staff confirmed that it is feasible to defer to Phase 2.
Lower arena roof	\$ -	NA	\$ 410,000	Add steel roof structure (covered arena); could also serve as solar panel location	Metal roof structure 60'x90'. 2032 construction. Cost doesn't include solar panels but roof only.	\$ 410,000	Staff support covered Lower Arena if external funds are secured.
Upper arena	\$ -	NA	\$ 350,000	Improve with on-site excavated dirt.	While this work would align well with Phase 2 boarder area improvements, excavated soil from Phase I upper road improvements would need to be stockpiled for years. Midpen's design had included 2 1/2" of sand over 4" DG, and is included in this cost estimate.	\$ 350,000	Staff supports improvements to the Upper Arena if external funds are secured.
Upper Meadow Boarder Area	\$ -	NA	\$ 750,000	Phase 2, SDAE Boarder Area Map shows 6 corrals to board 12-18 horses in the upper meadow.	The Bear Creek Redwoods Preserve Plan designates the upper meadow area for restoration. Implementation of this improvement will require additional environmental review and board approval.	\$ -	Staff do not support use of the Upper Meadow for horse boarding. The Bear Creek Redwoods Preserve Plan designates the Upper Meadow area for restoration. Implementation of this improvement will require additional environmental review and Board approval.
GC/Mobilization/Site Preparation	\$ -	NA	\$ 290,000			\$ 250,000	
<i>Cost escalations</i>	<i>Future year costs projected with 6% annual escalation. For cost estimating purposes only, Phase 2 is anticipated to start in 2032.</i>						

Improvement	Repair Plan		Ad Hoc Plan			Modified Plan	
	Cost	Staff comments	Cost	Ad Hoc proposal	Staff comments	Cost	Staff comments
Additional costs not included above							
Soft costs*	-		\$250,000			\$200,000	
<i>* Separate from capital construction costs, the District has incurred \$755,000 in consultant costs to date (feasibility studies, designs, permit application preparation). The soft costs indicated would be needed to complete the Project (final plans, as-builts, construction administration, and, if needed, additional assessments and studies such as geotechnical, structural, and biological).</i>							