



City of Santa Clarita

Engineer's Report

Open Space Preservation District

FISCAL YEAR 2026/2027

Intent Meeting: May 26, 2026

Public Hearing: June 9, 2026

Prepared on: May 11, 2026

27368 Via Industria
Suite 200
Temecula, CA 92590
T 951.587.3500 | 800.755.6864
F 951.587.3510

www.willdan.com



**CITY OF SANTA CLARITA
OPEN SPACE PRESERVATION DISTRICT**

**ENGINEER'S REPORT
CERTIFICATE**

This Report describes the District including the improvements, budgets, parcels and assessments to be levied for Fiscal Year 2026/2027, as they existed at the time of the passage of the Resolution of Intention. Reference is hereby made to the Los Angeles County Assessor's maps for a detailed description of the lines and dimensions of parcels within the District. The undersigned respectfully submits the enclosed Report as directed by the City Council.

Dated this _____ day of _____, 2026.

Willdan Financial Services
Assessment Engineer

By: _____
Stacee Reynolds
Principal Consultant, District Administration Services

By: _____
Tyrone Peter
PE # C81888

I HEREBY CERTIFY that the enclosed Engineer's Report, together with Assessment Roll and Assessment Diagram thereto attached was filed with me on the _____ day of _____, 2026.

By: _____
Melody Bartlette, City Clerk
City of Santa Clarita
Los Angeles County, California

I HEREBY CERTIFY that the enclosed Engineer's Report, together with Assessment Roll and Assessment Diagram thereto attached was approved and confirmed by the City Council of the City of Santa Clarita, California, on the _____ day of _____, 2026.

By: _____
Melody Bartlette, City Clerk
City of Santa Clarita
Los Angeles County, California

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- 2) Open Space Acquisition Implementation Work Program

I. OVERVIEW

A. BACKGROUND

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

On August 13, 2014, LAFCO (Local Agency Formation Commission) approved Annexation 2013-03 (North Saugus) to the City of Santa Clarita. On October 14, 2014 LAFCO approved the boundary change of the City of Santa Clarita to include the North Saugus area. Beginning in Fiscal Year 2015/16, parcels in Annexation 2013-03 are subjected to the Open Space Preservation District Assessment.

On April 12, 2016, the City Council adopted Resolution No. 16-12, initiating annexation proceedings for the West Creek/West Hills annexation with the LAFCO. Annexation Application No. 2016-07 was submitted to LAFCO on April 14, 2016.

On June 28, 2016, the City Council approved and adopted a Joint Resolution between the City and Los Angeles County approving and accepting the negotiated exchange of property tax revenue relating to the pending annexation of areas within the unincorporated portion of Los Angeles County. Following the Council's action, the Los Angeles County Board of Supervisors adopted the same Joint Resolution at their Board meeting of July 19, 2016. LAFCO approved Annexation 2016-07 at their August 10, 2016, meeting and further held the protest hearing at their October 12, 2016, meeting. Annexation 2016-07 was completed on November 15, 2016 when the annexation was recorded with the State.

On April 24, 2018, the City Council adopted Resolution No. 18-14, which initiated annexation proceedings for the Plum Canyon annexation with the Local Agency Formation Commission (LAFCO). Annexation Application No. 2018-04 was submitted to LAFCO on June 27, 2018.

On July 10, 2018, the City Council adopted a joint resolution between the City of Santa Clarita (City) and County of Los Angeles, approving and accepting the negotiated exchange of property tax revenue relating to the pending annexation of areas within the unincorporated portion of Los Angeles County. Following the Council's action, the Los Angeles County Board of Supervisors adopted the same joint resolution at their board meeting on September 18, 2018. LAFCO approved Annexation 2018-04 at their October 10, 2018, meeting and further held the protest hearing at their November 14, 2018, meeting. Annexation 2018-04 was complete on November 15, 2018, when the annexation was recorded with the state.

On November 12, 2019, the City Council adopted Resolution No. 19-57, which initiated annexation proceedings for the Tesoro del Valle annexation with the Local Agency Formation Commission (LAFCO). Annexation Application No. 2020-01 was submitted to LAFCO on January 28, 2020. The Tesoro del Valle annexation was completed on November 14, 2022.

B. EFFECTS OF PROPOSITION 218

On November 5, 1996, the electorate approved Proposition 218, Right to Vote on Taxes Act, which added Articles XIIC and XIID to the California Constitution. The Article XIID affects all assessments upon real property for a special benefit conferred on the property. Assessments imposed under the Landscaping and Lighting Act of 1972 are these types of benefit assessments.

The provisions of Proposition 218 can be summarized in four general areas:

1. Strengthens the general and special tax provisions of Propositions 13 and 62;
2. Extends the initiative process to all local taxes, assessments, fees and charges;
3. Adds substantive and procedural requirements to assessments; and
4. Adds substantive and procedural requirements to property-related fees and charges.

//. PLANS AND SPECIFICATIONS

A. IMPROVEMENTS AUTHORIZED BY THE 1972 ACT

As applicable or may be applicable to this District, the 1972 Act defines improvements to mean one or any combination of the following:

- The installation or planting of landscaping.
- The installation or construction of statuary, fountains, and other ornamental structures and facilities.
- The installation or construction of public lighting facilities, including, but not limited to, traffic signals.
- The installation or construction of any facilities which are appurtenant to any of the foregoing or which are necessary or convenient for the maintenance or servicing thereof, including, but not limited to, grading, clearing, removal of debris, the installation or construction of curbs, gutters, walls, sidewalks, or paving, or water, irrigation, drainage, or electrical facilities.
- The installation of park or recreational improvements, including, but not limited to, all the following:
 - ❖ Land preparation, such as grading, leveling, cutting and filling, sod, landscaping, irrigation systems, sidewalks, and drainage.
 - ❖ Lights, playground equipment, play courts, and public restrooms.
- The maintenance or servicing, or both, of any of the foregoing.
- The acquisition of land for park, recreational, or open-space purposes.
- The acquisition of any existing improvement otherwise authorized pursuant to this section.
- Incidental expenses associated with the improvements include, but are not limited to:
 - ❖ The cost of preparation of the report, including plans, specifications, estimates, diagram, and assessment;
 - ❖ The costs of printing, advertising, and the publishing, posting and mailing of notices;
 - ❖ Compensation payable to the County for collection of assessments;
 - ❖ Compensation of any engineer or attorney employed to render services;

- ❖ Any other expenses incidental to the construction, installation, or maintenance and servicing of the improvements;
- ❖ Any expenses incidental to the issuance of bonds or notes pursuant to Section 22662.5.
- ❖ Costs associated with any elections held for the approval of a new or increased assessment.

The 1972 Act defines "maintain" or "maintenance" to mean furnishing of services and materials for the ordinary and usual maintenance, operation, and servicing of any improvement, including:

- Repair, removal, or replacement of all or any part of any improvement.
- Providing for the life, growth, health, and beauty of landscaping, including cultivation, irrigation, trimming, spraying, fertilizing, or treating for disease or injury.
- The removal of trimmings, rubbish, debris, and other solid waste.
- The cleaning, sandblasting, and painting of walls and other improvements to remove or cover graffiti.

B. DESCRIPTION OF IMPROVEMENTS TO BE MAINTAINED AND SERVICED

The Open Space Preservation District expands the City's existing Open Space, Park and Parkland Program. This program preserves, improves, finances, services and maintains facilities as described below.

It is the City Council's intent to utilize the additional funding from the Open Space Preservation District to expand the existing Open Space, Park, and Parkland Program to accelerate vacant land acquisition in and around the City in accordance with the guidelines outlined in the Open Space Acquisition Implementation Work Program, which is included herein and is provided in the Appendix.

The improvements are the acquisition, preservation, improvement, financing, servicing and maintenance of parks, parkland and open space lands and appurtenant equipment and facilities, including but not limited to, personnel, electrical energy, utilities such as water, materials, contracting services, debt service costs, and other items necessary for the satisfactory provision of these facilities and services.

Facilities include but are not limited to:

- Open Space Lands
- The Santa Clara River Watershed
- Trail Systems
- Wildlife Corridors
- Park and Recreation Facilities and Equipment

Maintenance means the furnishing of services and materials for the ordinary and usual maintenance, operation, preservation and servicing, including repair, removal or replacement of all or part of any of the park, parklands and open space lands or appurtenant equipment or facilities; providing for the life, growth, health and beauty of the landscaping, including cultivation, irrigation, trimming, spraying, fertilizing and treating for disease or injury; the removal of trimmings, rubbish, debris and other solid waste; brush clearing; and the cleaning, sandblasting, and painting of walls and other improvements to remove or cover graffiti.

Servicing means the furnishing of water for the irrigation and the furnishing of electric current or energy, gas or other illuminating agent for the operation of the park, parklands and open space lands or appurtenant equipment or facilities.

The City financed a portion of the facilities through the issuance of bonded indebtedness.

The plans and specifications for the improvements, showing the general nature, location and the extent of the facilities, are on file in the City Parks, Recreation and Community Services Department and are herein made a part of this report.

/// ESTIMATE OF COST

The City's budget for the Open Space, Park, and Parkland Program, shown below, details the estimated costs for Fiscal Year 2026/2027 as available at the time of preparation of this report. The 1972 Act provides that the total cost of the construction, acquisition, preservation, improvement, servicing and maintenance, together with incidental expenses, may be financed from the assessment proceeds. The incidental expenses may include engineering fees, legal fees, printing, mailing, postage, publishing, and all other related costs identified with the district proceedings.

Open Space, Park and Parkland Program Estimate of Costs:	
Open Space, Park, and Parkland Program	\$11,225,471
Expansion of the Program through the Preservation District	3,607,479
Less General Benefit Contribution (69.60)	(10,323,734)
Assessment shall not exceed Special Benefit Quantification of (30.40%):	\$4,509,216
Budget for Expansion of the Program through the Open Space Preservation District	
Resources:	
Beginning Bond Net Proceeds - Acquisition Reserve (positive)	\$0
Beginning Land Acquisition Reserve (Beginning Fund Balance FY 26/27)	9,581,866
Other Revenue (interest, etc.)	636,088
Total Resources:	\$10,217,954
Uses:	
Administration	\$1,466,577
Bond Debt Service	884,506
Capital Projects	0
Operating Reserve Per Section 22569(a)	1,175,541
Ending Land Acquisition Reserve (Ending Fund Balance FY 26/27)	10,298,808
Total Uses:	\$13,825,433
Total Preservation District Expansion Budget:	\$3,607,479
Total Assessable Benefit Units	81,988.16
Maximum Assessment per Benefit Unit	\$44.00
Applied Rate per Benefit Unit	\$44.00

Note:

(1) Detailed estimated cost of components of the Program are available in the Neighborhood Services Department and are incorporated herein by this reference.

(2) Under the Preservation District, the total estimated cost of the Improvements to be funded by the Preservation District is greater than the amount that can be conveniently raised from a single annual assessment. The City is authorized to determine such costs of one or more Improvements, including related debt service, to be collected in installments over a period not to exceed thirty (30) fiscal years from its initial funding, as provided in the annual Engineer's Report. On December 12, 2007, the City executed and delivered \$15,525,000 Certificates of Participation (Open Space and Parkland Acquisition Program) 2007 Series (the "Certificates") to fund such Improvements and the assessments from the Preservation District were pledged to make debt service payments on the Certificates. The debt service schedule is attached hereto as Appendix 1.

The 1972 Act requires that a special fund be set-up for the revenues and expenditures of the District. Funds raised by assessment shall be used only for the purpose as stated herein. The City may advance funds or incur bonded indebtedness, if needed, to ensure adequate cash flow or timing of the provision of the facilities, and will be

reimbursed for any such advances or payment of annual bond debt service upon receipt of assessments. Any surplus or deficit remaining on July 1 must be carried over to the next fiscal year.

IV. METHOD OF APPORTIONMENT

A. GENERAL

Part 2 of Division 15 of the Streets and Highways Code, the Landscaping and Lighting Act of 1972, permits the establishment of Assessment Districts by cities for the purpose of providing certain public improvements which include the construction, maintenance and servicing of park and recreation improvements and the acquisition of land for park, recreation or open space purposes.

Section 22573, Landscaping and Lighting Act of 1972 requires that assessments be levied according to benefit rather than according to assessed value. This section states:

"The net amount to be assessed upon lands within an assessment district may be apportioned by any formula or method which fairly distributes the net amount among all assessable lots or parcels in proportion to the estimated benefits to be received by each such lot or parcel from the improvements."

The Act permits the designation of zones of benefit within any individual assessment district if "by reason of variations in the nature, location, and extent of the improvements, the various areas will receive different degrees of benefit from the improvements." (Sec. 22574). Thus, the 1972 Act requires the levy of a true "assessment" rather than a "special tax."

In addition, Proposition 218, the "Right to Vote on Taxes Act" which was approved on the November 1996 Statewide ballot and added Article XIID to the California Constitution, requires that a parcel's assessment may not exceed the reasonable cost of the proportional special benefit conferred on that parcel. XIID provides that only special benefits are assessable and the City must separate the general benefits from the special benefits. XIID also requires that publicly owned properties that benefit from the improvements be assessed.

B. REASON FOR THE ASSESSMENT

The District funds a portion of the City's Open Space, Park, and Parkland Program (the "Program") as previously defined herein in Section II of this Report.

This Program covers park and recreation facilities, open space lands, the Santa Clara River watershed, trail systems and wildlife corridors throughout the City of Santa Clarita, and open space preservation around the perimeter of the City.

C. SPECIAL BENEFIT ANALYSIS

Parcels within the District are assessed for those improvements that provide a special benefit to the properties. Article XIID of the California Constitution defines special benefit as:

"A particular and distinct benefit over and above general benefits conferred on real property located in the district or to the public at large. General enhancement of property value does not constitute 'special benefit'."

D. SPECIAL BENEFIT DETERMINATION

In determining the proportionate special benefit derived by each identified parcel, the proximity of the parcel to the public improvements detailed in Part A above, and the capital, maintenance and operating costs of said public improvements, was considered and analyzed. Due to the close proximity of the parcels to the improvements detailed in Part A above, it has been demonstrated and determined the parcels are uniquely benefited by, and receive a direct advantage from, and are conferred a particular and distinct special benefit over and above general benefits by, said public improvements.

The overall quality of life and desirability of an area is enhanced when parks, open space and recreational facilities are in place, improved, operable, safe, clean and maintained. Property desirability in an area also increases when there is an increase in the number of parks, open space and recreation facilities.

Studies in a number of communities have indicated that recreation areas and facilities, if well maintained and wisely administered, have caused a marked increase in the property values of parcels in the community. Consequently, such recreation and park facilities have proved to be a potent factor in maintaining a sound economic condition and a high standard of livability in the community. These studies confirm the opinion long held by planning authorities as to the economic value of parks and recreational facilities in a community.

"The recreation value is realized as a rise in the value of land and other property in or near the recreation area, and is of both private interest to the landowner and others, holding an economic stake in the area, and of public interest to the taxpayers, who have a stake...." (National Recreation and Park Association, June 1985)

"Recreation and park amenities are central components in establishing the quality of life in a community. ... [businesses'] main resource is their employees for whom quality of life is an important issue... The availability and attractiveness of local parks and programs influences some companies' relocation decisions. ... the presence of a park encourages real estate development around it...." (California Parks & Recreation, Winter 1997)

The special benefit of parks and other recreational facilities conferred to residential and non-residential properties has been summarized by a number of studies. The United States Department of the Interior, National Park Service, in a publication dated June 1984, concluded that:

- "Parks and recreation stimulate business and generate tax revenues."
- "Parks and recreation help conserve land, energy, and resources."
- "An investment in parks and recreation helps reduce pollution and noise, and makes for a more pleasing community..."
- "Public recreation benefits all employers by providing continuing opportunities to maintain a level of fitness throughout one's working life, and through helping individuals cope with the stress of a fast-paced and demanding life."

Collaborative Economics, a Silicon Valley think-tank, has found strong connections between the physical design and attractive maintenance of community facilities and the new knowledge-driven, service-oriented economy (*Linking the New Economy to Livable Communities*, Collaborative Economics 1998). Businesses are increasingly valuing "quality of life" as a way to recruit and retain skilled workers (*Profiles of Business Leadership on Smart Growth*, National Association of Local Government Environmental Professionals, 1999).

Non-residential property (either vacant or developed) located within a community that actively promotes the design and maintenance of park and recreation facilities, is conferred a distinct and special benefit because

these features attract businesses, ensuring the highest and best use of the property. Area desirability helps to assure that vacant property is actually marketable to willing buyers and helps assure that the property owner can actually capture the full market value for property.

Residential property (both vacant and developed) benefits from the “area desirability” because workers are attracted to community, and will purchase homes, which again assures the highest and best use of the property. As described above, when an area is desirable, property is more marketable and owners are better positioned to capture the benefits full market value.

The entire community, and parcels within the community, are conferred a special benefit when parks and recreational facilities are included as part of the overall community design standard and are maintained.

The Supreme Court of California, in *Knox v. City of Orland*, acknowledged that parks confer special benefit. In this opinion, the Supreme Court of California stated, “in California, there is a lengthy history of legislative and judicial recognition that parks constitute proper subjects for special assessment.”

Homebuyers over age 55, considering a move, were surveyed about the amenities that “would seriously influence them in selecting a new community” in *Boomers on the Horizon: Housing Preferences of the 55+ Market*, National Association of Home Builders, 2002. The following results were found:

Amenity	Group	% Seeking Amenity	Rank on List
Walking and jogging trails	55+	52	1
Walking and jogging trails	55+ >\$75k per year	65	
Outdoor spaces	55+	51	2
Outdoor spaces (park)	55+, moving to suburbs	55	
Open Spaces	55+	46	4

Finally, the ERE Yarmouth and Real Estate Research Corporation has found that “smart communities” (those that actively plan and maintain parks, open space, streetscaping and pedestrian friendly features) will experience the fastest rise in real estate values (*Defining New Limits, Emerging Trends in Real Estate*, ERE Yarmouth and Real Estate Research Corporation, 1988).

In addition, all of the aforementioned above illustrates that parks, open space and recreational facilities contribute to a specific increase in property desirability which confers a particular and distinct special benefit upon the real property located within the district.

E. AREA OF BENEFIT

Proposition 218 states, “No assessment shall be imposed on any parcel which exceeds the reasonable cost of the proportional special benefit conferred on that parcel. Only special benefits are assessable, and an agency must separate the general benefits from the special benefits conferred on a parcel.”

Based on the above, the area of benefit for the facilities and services funded by the District are defined below:

The National Recreation and Park Association standards are used to define the service area of the City's existing parklands and open space areas. These standards state that a community park, which serves the needs of several neighborhoods, has a service radius of up to 3 miles. Properties within this 3-mile service radius are considered to receive special benefit from the facility.

To define the service area of the District, a 3-mile radius was drawn around all of the City's existing parklands and open space areas. This is shown on the Assessment Diagram at the back of this Report.

Parcels within the District service area are considered to receive special benefit from the District. The total area served by the Program, as defined above, is 149,340.58 acres. Of that area, 103,984.51 acres, or approximately 69.60 percent, is outside the city boundaries. The benefits conferred on these non-city parcels within the service areas are considered the "general benefits" associated with the District.

Therefore, only 30.40 percent of the District budget is assessed to City properties as the quantification of special benefits received, and 69.60 percent of the budget will be provided from other sources (e.g.: general fund, Proposition A funds, etc.).

F. GENERAL BENEFIT

Section 4 of Article XIID requires that the general benefits imparted by the Open Space, Park and Parkland Program be separated from the special benefits and that only the special benefit portion of the costs of the project be assessed against those parcels which are identified as receiving special benefits.

As stated above, only 30.40 percent of the District budget is assessed to properties within the City boundaries as the quantification of special benefits received, and 69.60 percent of the budget is defined as the "general benefits".

This quantification of general benefit is considered a conservative estimate as much of the area outside the City boundaries is currently sparsely developed when compared with the development intensity within the City.

All properties within the City of Santa Clarita are within the service area of the City's existing parklands and open space areas. Therefore, these properties receive special benefit from the existing facilities. The existing facilities are distributed throughout all areas of the City. Due to the uniform distribution of the existing parklands and open space areas in the City, it is considered a reasonable approximation of the ultimate service area of the parklands and open space to be obtained, developed and preserved through the Program.

Any future acquisition of undeveloped lands will be within the City of Santa Clarita city limits or within the service area of the City's existing parklands and open space areas. Due to this account and the fact that any undeveloped lands outside the City boundaries will remain essentially in their natural state, these additional areas are not considered to increase the benefit boundaries of the District.

Additional general benefits to the public at large are considered incidental and non-quantifiable and are more than adequately funded by the City's additional contribution.

G. SPECIAL BENEFIT METHODOLOGY

The District boundaries are coterminous with the City of Santa Clarita. To establish the special benefit to the individual parcels within the District, a Benefit Unit system is utilized. Each parcel of land is assigned Benefit Units (BU's) in proportion to the estimated special benefit the parcel receives relative to the other parcels

within the District from the Program. Benefit Units are established by considering both the dwelling unit equivalency of a property and the benefits provided, as discussed above.

Basic Formula:

$$(\text{Equivalent Dwelling Units}) \times (\text{Benefit Factor}) = \text{Benefit Units}$$

EQUIVALENT DWELLING UNITS

In order to allocate benefit fairly between the parcels, an Equivalent Dwelling Unit (EDU) methodology is utilized, which equates different types of land uses to a single-family residential parcel, thereby allowing a uniform method of assessment.

The EDU method uses the single family home as the basic unit of apportionment. A **single family home** equals one Equivalent Dwelling Unit (EDU). Every other land use is converted to EDU's as described below. All assessable properties in the District are assigned dwelling units and land use classifications per the County Assessor's roll. (Inaccuracies in the County data will be reviewed on a case by case basis as they are brought to the City's attention.)

The methodology to calculate the EDU's for other residential land uses and for non-residential parcels is as follows:

Every land use is converted to EDU's. Parcels containing apartments are converted to EDU's based on the number of dwelling units on each parcel of land; non-residential parcels are converted based on the lot size of each parcel of land.

Table 1 outlines the EDU formula.

Table I: EDU Formula

Land Use	Assessed Unit	x	EDU Factor	=	Equivalent Dwelling Unit Rate (EDU)
Residential					
Single family home	1 dwelling	x	1	=	1.00 EDU/dwelling
Single family vacant	1 parcel	x	0.25	=	0.25 EDU/parcel
Multi-Family (incl. Condo/Apt)	1 dwelling	x	0.75	=	0.75 EDU/dwelling
Mobile Home Parks	1 space	x	0.5	=	0.50 EDU/space
Developed Non-Residential					
Commercial, Industrial, Government, Church	1 acre	x	6	=	6.00 EDU/acre 1.00 EDU/parcel min
Vacant					
	1 acre	x	1.5	=	1.50 EDU/acre 0.25 EDU/parcel min
	5 acre	x	1.5	=	7.50 EDU/parcel max

Residential

Single Family Residences (SFR). A single family home equals 1 EDU.

Multi-family Residences (Apartments and Condominiums) and Mobile Home Parks. Multifamily residential parcels and Mobile Home Park equivalencies are determined by multiplying the number of dwelling units on each parcel by 0.75 and 0.5, respectively, due to the relative population density of these types of dwelling units and reduced unit size compared to the typical density and size of an SFR. Studies have consistently shown that the average apartment unit impacts infrastructure approximately 75% as much as a single-family residence and the average mobile home unit impacts infrastructure approximately 50%. (Sources: Institute of Transportation Engineers Informational Report Trip Generation, Fifth Edition, 1991; Metcalf and Eddy, Wastewater Engineering Treatment, Disposal, Reuse, Third Edition, 1991). Trip generation and wastewater usage are a function of population density. Based on this, it is concluded that other infrastructure will be similarly impacted at a reduced level. The smaller average unit size of multiple-residential and mobile homes results in a lesser enhancement per unit to property values.

The EDU's assigned to a multi-residential or to a mobile home parcel are calculated based on the number of dwelling units and the appropriate EDU factor. For example, the EDU factor for multi-residential (0.75) is multiplied by the number of dwelling units on the parcel to determine the total EDU's for the multiple residential parcel. Similarly, the total EDU's for a mobile home parcel are calculated by multiplying the EDU factor (0.5) by the number of mobile home units on the parcel.

Developed Non-Residential

Developed non-residential properties are defined as improved commercial, industrial and institutional properties (such as churches). In converting these properties to EDU's, the size of the parcels is compared to the median size of a single-family residential lot, which is 0.17 acres. This equals approximately 6 SFR lots per acre of land. Therefore, developed non-residential parcels are assigned EDU's at a rate of 6 EDU's per acre. The minimum EDU assignment for a developed non-residential parcel is 1.0 EDU per parcel, which is the same as a developed SFR.

The area of non-residential condominium parcels is calculated based on the individual area of the condo plus an equal share of the common area associated with the condominium project.

Vacant

Vacant property consists of parcels with few or no improved structures. These properties have virtually no impacts on infrastructure to make a comparison to developed property; however, based on the Los Angeles County Assessor's data, the average land value of an SFR property is between 45% and 50% of the total value. Splitting the difference between value and impacts, vacant property is assigned EDU's at the rate of 25 percent of improved property.

A vacant parcel, designated exclusively for a single-family residential unit by a recorded Tract Map or Parcel Map, will be assigned 0.25 EDUs per lot.

Other vacant parcels, including those properties designated as agricultural, are assessed based upon the acreage of the parcel. All of these parcels will be assigned EDU's at the rate of 25% of the developed non-residential properties, or 1.5 EDU's per acre.

Regarding larger vacant properties, a strict application of the EDU rate per acre will result in an inappropriately large assessment, particularly considering the fact that the vacant parcel provides some of the open space attributes the park system endeavors to provide. As the size of a parcel increases, it begins to provide proportionally larger open space characteristics. In order to recognize this, the EDU rate for vacant, non-SFR property is applied to the first 5 acres only. This provides the City with a mechanism to effectively model the benefits received by vacant, non-SFR property in the more urbanized areas (where vacant lot sizes tend to be smaller because of encroaching development) while also crediting the open space benefits provide by larger, undeveloped parcels.

Therefore, vacant, non-SFR parcels will be assessed 1.5 EDU's per acre up to a maximum of 5 acres per parcel. The minimum EDU assignment for a vacant parcel is 0.25 EDU's per parcel, which is 25% of a developed SFR.

Exempt

Exempted from the assessment are the areas of streets, avenues, lanes, roads, drives, courts, alleys, and public easements, rights-of-ways, and parkways. Also exempted from assessment are utility rights-of-way, common areas (such as in condominium complexes), landlocked parcels and small parcels vacated by the City as these parcels have little or no value and therefore do not benefit from the improvements.

In addition, parks, greenbelts and open space are exempt from assessment, as are public schools, golf courses (which are considered as parks in most cities' planning documents) and cemeteries, which are also considered to provide a type of parkland and open space.

Government-Owned Property

Prop. 218 states, "Parcels within a district that are owned or used by any [public] agency...shall not be exempt from the assessment unless the agency can demonstrate...that [the] parcels in fact receive no special benefit."

Government-owned (public) properties must be assessed for the benefits they receive. If no benefit is received (for example, parks and schools as discussed above) then the government owned parcels can be "exempt" from the assessment. Uses such as City Hall and maintenance yards are assessed as developed non-residential property.

BENEFIT FACTORS

Proper preservation of parklands and open space within and surrounding the City benefits properties by providing environmental quality and recreational enhancement. The amount of benefit received will vary with the different land use of the property. There are two categories from which the total benefit of a parcel is derived, and these benefits are weighted equally with respect to each other:

1. **Environmental Quality Benefit.** The improvement of the quality of air, visual aesthetics and attractiveness of the community as a place to live, work and do business. All properties within the District are considered to receive this benefit.
2. **Recreation Enhancement Benefit.** The availability of useable and safe parkland and recreational facilities. Only residential properties are considered to receive this benefit as it more directly relates to the enhancement of the quality of life in the residential community.

Table 2 outlines the Benefit Factors for the Open space, park and parkland program:

Table II: Open Space & Parkland Benefit Factors

Land Use:	Residential	Non-Residential
1. Environmental Quality	0.5	0.5
2. Recreation Enhancement	0.5	0
Total Benefit Factor =	1	0.5

BENEFIT UNITS

As discussed above, the basic formula for calculating Benefit Units for each property is as follows:

$$\text{Basic Formula:} \\ (\text{Equivalent Dwelling Units}) \times (\text{Benefit Factor}) = \text{Benefit Units}$$

Table 3, below, outlines the Benefit Unit calculations for various properties:

Table III: Benefit Unit Calculation

Land Use	Assessed Unit	x	EDU Factor	x	Benefit Factor	=	Benefit Unit (BU) Rate
Residential							
Single family home	1 dwelling	x	1.0	x	1.0	=	1.00 BU / dwelling
Single family vacant	1 parcel	x	0.25	x	1.0	=	0.25 BU / parcel
Multi-Family (incl. Condo)	1 dwelling	x	0.75	x	1.0	=	0.75 BU / dwelling
Mobile Home Parks	1 space	x	0.5	x	1.0	=	0.50 BU / space
Developed Non-Residential							
Commercial, Industrial, Gov, Church	1 acre	x	6	x	0.5	=	3.00 BU / acre
	1 EDU min			x	0.5	=	0.50 BU/ parcel min
Vacant							
	1 acre	x	1.5	x	0.5	=	0.75 BU / acre
			0.25 EDU min	x	0.5	=	0.125 BU/ parcel min
	5 acre	x	1.5	x	0.5	=	3.75 BU/ parcel max

Table 4, below, provides a summary of Benefit Units for the City of Santa Clarita.

Table IV: Assessable Benefit Unit Summary by Land Use

Land Use	No. of Parcels	No. of dwellings	No. of Acres	No. Of Benefit Units
Residential				
Single family home	43,664	43,664		43,664.00
Single family vacant	1,318	1,318		329.50
Multi-family residential	434	12,467		9,350.25
Condominiums	20,204	20,204		15,153.00
Mobile Home Parks	27	2,447		1,223.50
Developed Non-Residential				
Commercial / Industrial (incl. Government & Church)	2,057		3,522.69	10,646.83
Vacant				
Vacant 5 acres or less	579		839.62	638.59
Vacant more than 5 acres	262		6,630.44	982.50
Totals:	68,545	80,100	10,992.75	81,988.16

ASSESSMENT RATE CALCULATION

Table 5 provides the assessment rate calculation for FY 2026/2027.

Table V: Assessment Rate Calculation

Estimated Budget	No. of BU's	FY 2026/27 Applied Assessment per BU	FY 2026/27 Maximum* Assessment per BU	FY 2025/26 Maximum Assessment per BU
\$3,607,478.41	81,988.16	\$44.00	\$44.00	\$43.00

* The maximum annual assessment rate will be increased each year by \$1.00 per Benefit Unit (table below). The actual assessments levied in any fiscal year will be as approved by the City Council and may not exceed the maximum assessment rate without receiving property owner approval for the increase.

Sample calculations for various land uses are provided in the following Table 6:

Table VI: Sample Calculations

Land Use	No. of Units or Parcel Size	x	EDU Factor	x	Benefit Factor	=	Benefit Units	FY 26-27 Annual Asmt.
Residential								
Single family home	1 dwelling	x	1	x	1	=	1	\$44.00
Single family vacant (subdivided)	1 parcel	x	0.25	x	1	=	0.25	\$11.00
Condominium	1 dwelling	x	0.75	x	1	=	0.75	\$33.00
Duplex	2 dwellings	x	0.75	x	1	=	1.5	\$66.00

Land Use	No. of Units or Parcel Size	x	EDU Factor	x	Benefit Factor	=	Benefit Units	FY 26-27 Annual Asmt.
4-plex	4 dwellings	x	0.75	x	1	=	3	\$132.00
10-unit Apartment	10 dwellings	x	0.75	x	1	=	7.5	\$330.00
Mobile Home Parks	10 spaces	x	0.5	x	1	=	5	\$220.00
Developed Non-Residential								
Commercial, Industrial, Gov, Church	0.25 acre	x	6	x	0.5	=	0.75	\$33.00
Commercial, Industrial, Gov, Church	0.5 acre	x	6	x	0.5	=	1.5	\$66.00
Commercial, Industrial, Gov, Church	1 acre	x	6	x	0.5	=	3	\$132.00
Vacant								
Vacant	0.5 acre	x	1.5	x	0.5	=	0.38	\$16.72
Vacant	1 acre	x	1.5	x	0.5	=	0.75	\$33.00
Vacant	5 acre	x	1.5	x	0.5	=	3.75	\$165.00
Vacant	10 acre					=	3.75	\$165.00

* Vacant parcels with more than 5 acres are assessed a maximum amount of 3.75 benefit units.

ASSESSMENT DURATION

The Open Space Preservation District is proposed to exist for thirty (30) years beginning with 2007/08 and maturing in Fiscal Year 2036/37.

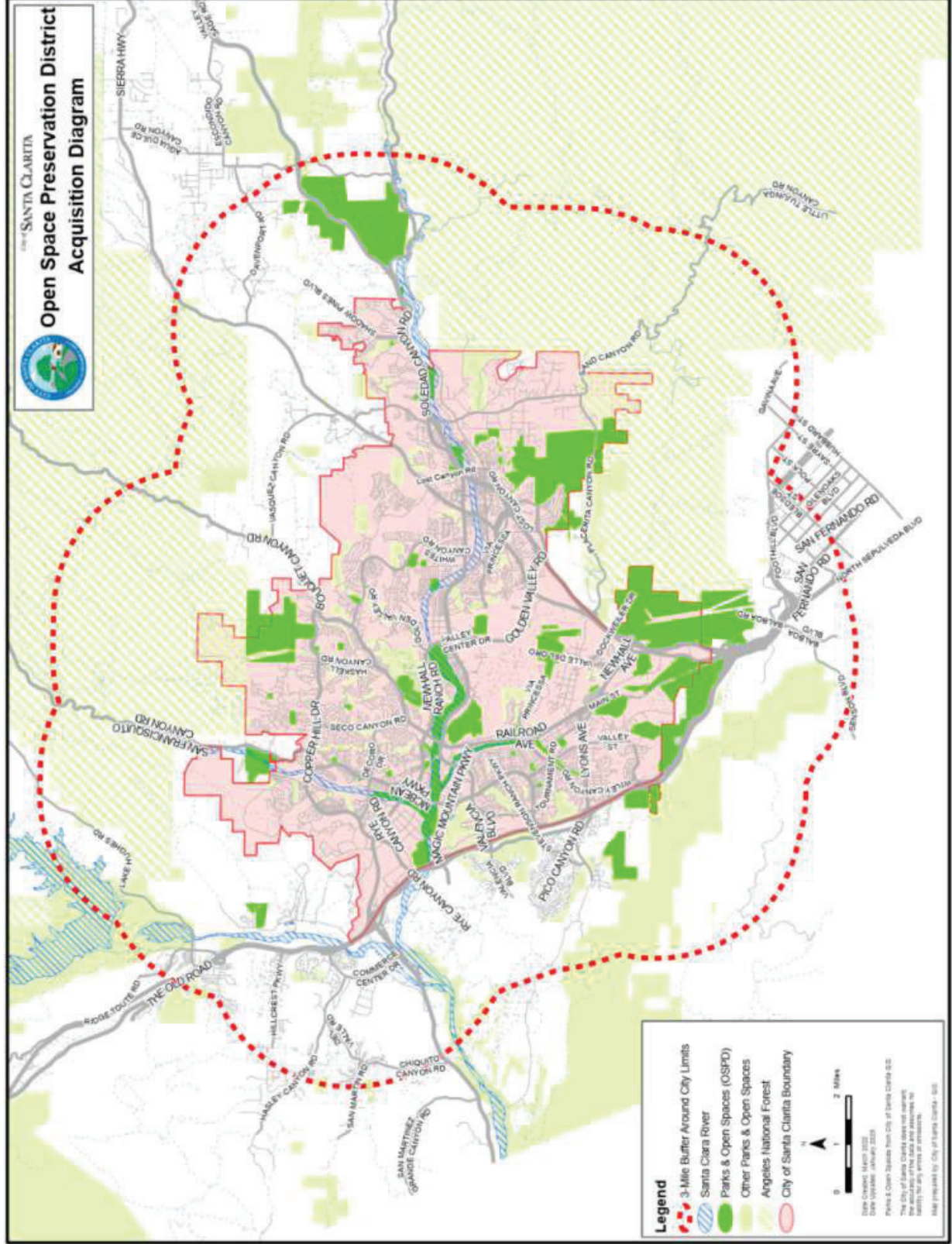
V. ASSESSMENT ROLL

The Assessment Roll is a listing of the proposed assessment for Fiscal Year 2026/2027 apportioned to each lot or parcel, as shown on the last equalized roll of the Assessor of the County of Los Angeles. The Preliminary Assessment Roll is provided as part of this report and is incorporated herein.

The description of each lot or parcel is part of the records of the Assessor of the County of Los Angeles and these records are, by reference, made part of this Report.

VI. ASSESSMENT DIAGRAM

The Assessment Diagram for the District is provided on the following page. The lines and dimensions of each lot or parcel within the District are those lines and dimensions shown on the maps of the Assessor of the County of Los Angeles, for the year when this Report was prepared, and are incorporated by reference herein and made part of this Report.



Appendix 1

Certificates of Participation Open Space and Parkland Acquisition Program 2007 Series Debt Service Schedule

BOND DEBT SERVICE

Santa Clarita Public Financing Authority Refunding Lease Revenue Bonds 2016 Series B - Open Space FINAL VERIFIED NUMBERS

Period Ending	Principal	Coupon	Interest	Debt Service	Annual Debt Service	Bond Balance	Total Bond Value
06/22/2016						14,020,000	14,020,000
10/01/2016	295,000	4.000%	123,064.22	418,064.22	418,064.22	13,725,000	13,725,000
04/01/2017			217,853.13	217,853.13		13,725,000	13,725,000
10/01/2017	275,000	4.000%	217,853.13	492,853.13	710,706.26	13,450,000	13,450,000
04/01/2018			212,353.13	212,353.13		13,450,000	13,450,000
10/01/2018	305,000	4.000%	212,353.13	517,353.13	729,706.26	13,145,000	13,145,000
04/01/2019			206,253.13	206,253.13		13,145,000	13,145,000
10/01/2019	340,000	4.000%	206,253.13	546,253.13	752,506.26	12,805,000	12,805,000
04/01/2020			199,453.13	199,453.13		12,805,000	12,805,000
10/01/2020	375,000	4.000%	199,453.13	574,453.13	773,906.26	12,430,000	12,430,000
04/01/2021			191,953.13	191,953.13		12,430,000	12,430,000
10/01/2021	410,000	4.000%	191,953.13	601,953.13	793,906.26	12,020,000	12,020,000
04/01/2022			183,753.13	183,753.13		12,020,000	12,020,000
10/01/2022	445,000	4.000%	183,753.13	628,753.13	812,506.26	11,575,000	11,575,000
04/01/2023			174,853.13	174,853.13		11,575,000	11,575,000
10/01/2023	485,000	4.000%	174,853.13	659,853.13	834,706.26	11,090,000	11,090,000
04/01/2024			165,153.13	165,153.13		11,090,000	11,090,000
10/01/2024	525,000	4.000%	165,153.13	690,153.13	855,306.26	10,565,000	10,565,000
04/01/2025			154,653.13	154,653.13		10,565,000	10,565,000
10/01/2025	565,000	4.000%	154,653.13	719,653.13	874,306.26	10,000,000	10,000,000
04/01/2026			143,353.13	143,353.13		10,000,000	10,000,000
10/01/2026	610,000	4.000%	143,353.13	753,353.13	896,706.26	9,390,000	9,390,000
04/01/2027			131,153.13	131,153.13		9,390,000	9,390,000
10/01/2027	655,000	2.000%	131,153.13	786,153.13	917,306.26	8,735,000	8,735,000
04/01/2028			124,603.13	124,603.13		8,735,000	8,735,000
10/01/2028	690,000	2.000%	124,603.13	814,603.13	939,206.26	8,045,000	8,045,000
04/01/2029			117,703.13	117,703.13		8,045,000	8,045,000
10/01/2029	725,000	2.000%	117,703.13	842,703.13	960,406.26	7,320,000	7,320,000
04/01/2030			110,453.13	110,453.13		7,320,000	7,320,000
10/01/2030	755,000	2.125%	110,453.13	865,453.13	975,906.26	6,565,000	6,565,000
04/01/2031			102,431.25	102,431.25		6,565,000	6,565,000
10/01/2031	795,000	2.375%	102,431.25	897,431.25	999,862.50	5,770,000	5,770,000
04/01/2032			92,990.63	92,990.63		5,770,000	5,770,000
10/01/2032	835,000	2.375%	92,990.63	927,990.63	1,020,981.26	4,935,000	4,935,000
04/01/2033			83,075.00	83,075.00		4,935,000	4,935,000
10/01/2033	875,000	4.000%	83,075.00	958,075.00	1,041,150.00	4,060,000	4,060,000
04/01/2034			65,575.00	65,575.00		4,060,000	4,060,000
10/01/2034	935,000	4.000%	65,575.00	1,000,575.00	1,066,150.00	3,125,000	3,125,000
04/01/2035			46,875.00	46,875.00		3,125,000	3,125,000
10/01/2035	990,000	3.000%	46,875.00	1,036,875.00	1,083,750.00	2,135,000	2,135,000
04/01/2036			32,025.00	32,025.00		2,135,000	2,135,000
10/01/2036	1,040,000	3.000%	32,025.00	1,072,025.00	1,104,050.00	1,095,000	1,095,000
04/01/2037			16,425.00	16,425.00		1,095,000	1,095,000
10/01/2037	1,095,000	3.000%	16,425.00	1,111,425.00	1,127,850.00		
	14,020,000		5,668,945.62	19,688,945.62	19,688,945.62		

Appendix 2

Open Space Acquisition Implementation Work Program



City of
SANTA CLARITA

OPEN SPACE ACQUISITION IMPLEMENTATION
WORK PROGRAM
FISCAL YEAR **2026-27**

at the Financial Accountability and Audit Panel Meeting on **April 7, 2026**

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EXECUTIVE SUMMARY

Open Space Preservation District Background

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

Open Space Preservation District Formation

Property owners from the City voted to support the new Open Space Preservation District (District), with 69 percent ballots in favor and 31 percent opposed. The District needed a simple majority of assessment to pass, which was received. On July 17, 2007, the City Council adopted a resolution forming the City of Santa Clarita Open Space Preservation District.

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

District Purpose

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

Prior to the formation of the District, the City already had an extensive Program for the acquisition, preservation, improvement, service and maintenance of parks, parkland, and open space lands. The Program is responsible for the implementation of various functions associated with park maintenance and park planning and development. It provides planning and administration for the acquisition and construction of parks, open space, trails and grounds, as well as the operations and maintenance supplies to maintain the parks, facilities, trails, and open space. In addition, this Program works with the community on the master plans and designs of various park facilities, and oversees the implementation of these designs by managing the construction process.

It is the City Council's intent to use the additional funding from the District to expand the Program to accelerate vacant land acquisition in and around the City. The City had been doing this to some extent in previous years, but this allowed more funds to be used for this purpose.

District Funds

When the District was formed in Fiscal Year 2007-08, the City's Parks Program budget was approximately \$6.8 million. The District was projected to increase the funds by approximately \$1.5 million and the City Council had committed the \$1.5 million funds from the District to acquire vacant lands in and around the City, as identified in this Annual Open Space Acquisition Implementation Work Program (Work Program).

In 2007, the City Council approved the issuance of debt to finance the acquisition of open space and parkland by executing and delivering \$15,525,000 in Certificates of Participation (COPs - Open Space and Parkland Program) 2007 Series. This represented approximately half of the City's borrowing capacity and was the first bond issuance in a series of two.

As of fiscal year ending June 30, 2017, all bond proceeds have been exhausted.

Parcel Payments into the District

In 2007, a single-family residence paid \$25, which is the designated Assessment Rate (Rate). Condominiums, townhomes, and apartments paid \$18.75 for each unit and mobile home parks paid \$12.50 per space.

Non-residential developed property, such as commercial, industrial, and institutional land uses paid \$75 per acre and vacant parcels paid \$18.75 per acre up to 5 acres (not to exceed \$93.75).

The maximum Rate that can be charged may increase by \$1 each year. **For FY 2025-26, the Rate is \$43** which is equal to the adjusted maximum allowable Rate. The actual Rate in any fiscal year must be approved by the City Council prior to the levy and may not exceed the maximum Rate without receiving property owner approval for the increase.

Assessment District Duration

The assessment will be in place for 30 years through FY 2036-37.

Engineer's Report and Annual Work Program

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

This Work Program outlines how the open space acquisition will be accomplished, what the priorities and provides acquisition principles, such as:

- The acquired land is within the three-mile benefit area boundary for the District (which is defined as within a three-mile radius of the City's boundary).

- At least 90 percent of the acres purchased will be preserved for natural open space (so that no more than 10 percent of the acres purchased will be used for future improved active parkland).

The Role of Financial Accountability and Audit Panel

The Santa Clarita Financial Accountability and Audit Panel (Panel) was established by the City Council in May 2007. The Panel is responsible for:

- Reviewing and approving the annual work program to ensure land acquisition priorities are adhered to;
- Reviewing the accounting of funds generated by the District;
- Working in conjunction with the City's independent auditor to ensure the District funds were spent properly and that good fiscal management of the funds is occurring;
- Making determinations as to whether the proposed expenditures are consistent with the criteria and the requirements established in the Engineer's Report; and
- Preparing an annual written report for the public, summarizing the items above.

The Panel is not responsible for the selection of land to be acquired by the City; rather, prospective land acquisition is the responsibility and authority of the City Council. Additional responsibilities, duties and guidelines of the Panel are outlined and formally approved in the Panel's Bylaws.

WORK PROGRAM

A. PRESENT CHALLENGES

The City of Santa Clarita incorporated in 1987 and encompasses the communities of Canyon Country, Newhall, Saugus, and Valencia. Surrounding the City are various unincorporated areas and the Angeles National Forest. As of **December 31, 2025**, the City had approximately **601** acres of active parkland, just over **158** miles of trails and over **13,660** acres of City-owned open space. The City's population is approximately **232,377** as of **January 1, 2025**. The City's General Plan requires five acres of active parkland per 1,000 in population. Based on the requirement, the City faces a deficit of approximately **524 acres** of active parkland and continues to seek a greenbelt/buffer of preserved open space around the Santa Clarita Valley (Valley) and the City.

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

The City should build upon its strong history of park stewardship and development, trail construction, and open space preservation. If the City wishes to pass on to future generations of residents a community that values the preservation of natural land and rare biological and geological regions, the City must continue to prioritize the protection and enhancement of local open space and parkland.

B. TYPES OF UNDEVELOPED LAND TO BE ACQUIRED

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

- *Undeveloped Land Preservation* – This effort will seek to preserve and protect the undeveloped areas around the Valley and further the City’s goal to create a greenbelt/buffer around the Valley and reduce sprawl.
- *Santa Clara River Watershed* – To bring the last unchanneled river in Southern California into public ownership and protect its wild, valuable habitat has long been a City goal.
- *Trails* – Santa Clarita is well known for its miles of scenic and functional bike and multi-use trails, which link neighborhoods to parks and open space, yet many more critical linkages remain to be added and completed.
- *Wildlife Corridors* – Protection and enhancement of the core habitat of unique, endemic, and valuable plants and animals is a critical goal.

C. ACQUISITION PRINCIPLES

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

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

- 1) To acquire parcels of undeveloped land.
- 2) To provide local matching funds as a way to attract state, federal, and foundation funds.

- 3) To provide new methods for undeveloped land preservation, including the appropriate use of conservation easements, trails, and protection of rivers and creeks.
- 4) To distribute the open space acquisition equitably in and around the City and/or the three-mile Area of Benefit boundary.
- 5) To assure that new and existing undeveloped lands receive the necessary stewardship.
- 6) To ensure that land that is acquired is within the three-mile benefit area boundary; this is defined as within a three-mile radius of the City's existing boundary.
- 7) To acquire ecologically significant parcels of undeveloped land and engage in regional cooperative efforts.
- 8) To acquire parcels of undeveloped land of regional importance.

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

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

D. ACREAGE ALLOCATION RATIO

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

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

E. DESCRIPTION OF LAND ACQUISITION PROJECTS

The City of Santa Clarita's 2002 Open Space Acquisition Plan, the Nature Conservancy's 2006 Santa Clara River Upper Watershed Conservation Plan, the Santa Clarita River Watershed Plan, the Los Angeles County Significant Ecological Areas Program, South Coast

Wildlands Missing Linkages, Rim-of-the-Valley studies, and other relevant technical documents will be considered to prioritize properties for land acquisition.

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

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

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

- Eastern Region:
 - Approximate Area: From the 14 Freeway east to the Angeles National Forest and from the intersection of the 5/14 Freeways north to Vasquez Rocks.
 - Goals: To create a continuous strip of open space along the eastern border of the City of Santa Clarita; connect open space between the City's boundary and the Angeles National Forest whenever possible.
 - Status: The City has made considerable progress in the eastern region. Open space property is in public ownership near the proposed Transit Mixed Concrete (CEMEX) project, Whitney Canyon and several hundred acres associated with the Golden Valley Ranch development. The City, working with the Mountains Recreation and Conservation Authority, purchased an additional 243 acres in this region in 2010 and in 2012, in partnership with Santa Monica Mountains Conservancy and Los Angeles County, acquired 1,027 acres in the Eastern

CAPP. The 13-acre Alfieri Property, adjacent to the CEMEX site, was purchased in FY 2015-16. In October 2016, 52 acres were added to Golden Valley Ranch Open Space and additional 89 acres were added in April 2017, totaling 141 acres in FY 2016-17. In December 2017, 10 acres adjacent to Golden Valley Ranch Open Space were donated by the Stevenson Family. In October 2020, the City acquired an additional 102 acres in the Eastern Greenbelt. In February 2022, the City acquired an additional 10 acres of open space in Los Angeles County in the Acton area. In June 2022 an additional 208 acres of open space known as Bee Canyon was acquired. **Most recently, in January 2025, an additional 169 acres were acquired, known as Hartigan Open Space.**

- Southern Region:
 - Approximate Area: From the intersection of the 5/14 Freeways interchange north to the City of Santa Clarita boundary and between the identified Eastern and Western Regions.
 - Goals: Link natural habitat and habitat migration corridors between the eastern and western regions.
 - Status: A total of 249 acres were acquired in July 2016 and March 2017 as part of the Newhall Pass Open Space. This region also contains the historic Beale's Cut property. In December 2019 and February 2020, 54 acres were dedicated and donated by Needham Ranch Land Company. An additional 10 acres were donated by the Stuart family.
- Western Region:
 - Approximate Area: From the 5 Freeway to the Santa Susanna Mountains Significant Ecological Area in the west, areas around Stevenson Ranch and from the Interstate 5/14 Freeway interchange to San Francisquito Creek in the north.
 - Goals: To create a continuous strip of open space along the western border of the City of Santa Clarita.
 - Status: Several significant properties exist in the region including the Santa Clarita Woodlands, Rivendale, Mentryville, and 6,000 acres associated with the Newhall Ranch Development. **In August 2024, 40 acres were acquired adjacent to Rivendale Open Space, known as the Regan Property. Most recently, in January 2025, an additional 242 acres were also acquired adjacent to Rivendale Open Space, known as the Ayres Property.**
- Northern Region:

- Approximate Area: From the northern boundary of the City of Santa Clarita north to the Angeles National Forest and from the Interstate 5 Freeway/Highway 126 interchange to Vasquez Rocks.
- Goals: To create a continuous strip of open space along the northern border of the City of Santa Clarita. Connect open space between the City of Santa Clarita and the Angeles National Forest whenever possible.
- Status: In FY 2016-17, the City marked its first acquisition in this region of surrounding greenbelt with the purchase of 78 acres in Tapia Canyon. In FY 2018-19, 176 acres were added to this region with the acquisition of the San Francisquito Open Space. In FY 2022-23, 200 acres known as Blue Cloud were acquired adjacent to Haskell Canyon Open Space. **Most recently in January 2025, an additional 40 acres, known as the Encore Property, were acquired adjacent to the Tesoro Open Space that is conditioned to be dedicated to the City.** Further development of this region should be monitored and open space dedication pursued whenever possible.
- City of Santa Clarita:
 - Area: All areas contained within the defined boundaries of the City of Santa Clarita.
 - Goals: Work with all City departments, partners and in conjunction with the Open Space Plan; the Parks, Recreation and Open Space Master Plan; River Features Study; and other documents to acquire and protect open space, both active and passive, within the City limits. Work in partnership with the development community to secure open space through dedication.

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

F. ACQUISITION WORK PLAN

Procedures to Accomplish and Implement Goals

The goals and objectives of the Open Space Acquisition Plan will be met by an objective work plan. This work plan will enable the City of Santa Clarita to evaluate and rank potential open space in the Valley and maximize the limited funding and resources available for land acquisition and the Open Space Preservation District funds.

Potential Open Space

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

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

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

Ranking Process

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

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

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

- Step One – Category of Land

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

1. Inside the City of Santa Clarita.
2. Outside the City of Santa Clarita and within the Open Space Preservation District's three-mile Area of Benefit boundary.

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

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

- Step Two – Development Status

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

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

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

- Step Three – Availability Status

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

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

- Step Four – Create Subcategories

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

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

Development Status E	Development Status E
Development Status F	Development Status F
Development Status G	Development Status G

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

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

- Step Five – Apply Criteria

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

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

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

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

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

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

- Step Six – Catalog Generation

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

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

- Step Seven – Recommend Parcels for Acquisition

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

- Work Plan Flexibility

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

The Work Plan must be flexible enough to allow for amendments. Because development occurs rapidly and the status of land changes in a similar fashion, the Work Plan, or parts of it, should be updated as needed. An explanation of steps one through seven is explained further in Section G: Open Space Evaluation Process, Step-by-Step.

Applications

This Work Plan can be used for a variety of applications; however, there are three major areas of implementation:

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

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

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

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

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

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

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

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

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

G. OPEN SPACE EVALUATION PROCESS

Step-by-Step Instructions

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

1. Land Category – Determine whether the property is inside or outside of the District's three-mile Area of Benefit boundary.

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

Step 1 – Land Category

Step 1 requires the evaluator to determine whether the property is inside or outside of the three-mile Area of Benefit boundary. This can be done by consulting the District map (Appendix B).

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

Step 2 – Development Status

Step 2 in the process is to obtain the development status of the property from the Planning Division. To do so, staff will provide Planning with one of the following pieces of information (listed in priority order):

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

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

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

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

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

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

Step 3 – Availability Status

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

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

At the end of Step 3, the property should be categorized as "Inside the City" or "Outside the City and within the three-mile Area of Benefit boundary," have a development status assigned to it (A through G) and be known whether the property owner is a willing seller/donor.

Step 4 – Create Subcategories

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

Properties that are "Outside the City and within the three-mile Area of Benefit boundary" and have a Development Status A are identified as the highest priority for acquisition. Conversely, properties that are "Inside the City" with a Development Status of D or E are identified as the lowest priority for acquisition.

It should be noted that properties that are “Outside the City and within the three-mile Area of Benefit boundary” with a Development Status of D or E may or may not be a higher acquisition priority than, for example, a property that is “Inside the City” and a Development Status A. These instances should be considered on a case-by-case basis.

After Step 4, the property being evaluated should be placed in one of these categories:

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

Step 5 – Apply Criteria

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

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

Steps to Complete the OSIC

1. Provide basic property information including:
 - The APN
 - The date(s) the evaluation was conducted
 - The initials of the evaluator
 - The availability status (willing seller/donor)
 - A brief description of the location of the property
2. Provide basic category and development status information. Circle whether the property is inside or outside the City and inside or outside the three-mile Area of Benefit boundary and circle the letter that corresponds to the property’s appropriate development status.
3. Evaluate each element and sub-element of each of the six inventory categories. These six categories are:
 - Habitat Areas
 - Ridgelines and Viewsheds
 - Recreational Resources
 - Cultural/Historical Resources

- Other Resources
- Hazard/Other Areas

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

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

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

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

Note that marks in the Hazard/Other Area category are not included in the overall total. Instead, these marks are meant to be general indicators of potentially negative aspects of the property. The City may wish to reconsider acquisition of properties

that contain any of the sub-elements in this category, regardless of the extent or frequency.

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

5. Add the inventory category scores to compute the property’s overall score. When each category score has been recorded in the spaces provided on the front page of the OSIC, the scores should be totaled (except those in the Hazards category). This is the final score of the property being evaluated. By the end of Step 5, the property being evaluated should have a total score associated with it. The higher the score, the greater the relative value of the property to the City.

Step 6 – Catalog Generation

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

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

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

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

Step 7 – Recommend Parcels for Acquisition

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