



## SUMMARY REPORT

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**Agenda Date:** 5/6/2025

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**To:** Board of Directors of the Sonoma County Agricultural Preservation and Open Space District **Department or Agency Name(s):** Agricultural Preservation and Open Space District  
**Staff Name and Phone Number:** Amy Ricard, 565-7261; Pamela Swan, 565-7348  
**Vote Requirement:** Majority  
**Supervisory District(s):** Countywide

**Title:**

2025 Community Spaces Matching Grant Program Update and Proposed Alternative Approach

**Recommended Action:**

- A) Receive an update on the Community Spaces Matching Grant Program after the first year of its pilot rolling application program.
- B) Authorize Ag + Open Space to adopt a true rolling application model without annual or biennial funding cycles and updated Community Spaces Guidelines reflecting this amendment. ☐
- C) Delegate authority to the General Manager to make technical, non-substantive changes in the Community Spaces Guidelines with the prior approval of the District's Counsel.

**Executive Summary:**

Since its inception, the Sonoma County Agricultural Preservation and Open Space District (Ag + Open Space) has continuously worked to increase the impact and efficiency of the Community Spaces Matching Grant Program (Community Spaces). Over the last few cycles, we have learned much about the changing needs of the community, the interests of our Board of Directors (Board), and the type of process that would best meet both.

The current competitive process is extensive, time-consuming, and results in several new projects being activated at one time. It is important to engage in this intensive process when it is being used to make challenging funding recommendations based on a limited amount of funding. Yet, in the last three cycles, even with staff and advisory body recommendations of lower funding amounts, the Board has prioritized full funding for almost all grant requests, exceeding the designated funding amounts they had previously authorized for each cycle. In 2024, the first year of a 2-year rolling application pilot program, the Board committed \$6.8M - \$800,000 more than the \$6M authorized for both 2024 and 2025, the entirety of the pilot program. Staff fully supports the Board's interest in maximizing our ability to help realize these critical community projects and are proposing an alternative to the current process.

Staff proposes using the Board-approved guidelines and assessment criteria to evaluate individual projects on a true rolling basis, as we do with traditional conservation easement acquisition projects. This would give staff more time to conduct outreach to priority communities, build awareness and relationships, and support partners and community organizations in developing Community Spaces projects that are ready to implement when they apply for funding. This process would still employ the same level of scrutiny when evaluating

projects but would be more streamlined and create an even and steady cadence of new projects entering the program. □

Staff further proposes that there would no longer be a specific designated funding amount for a given year or cycle. The Advisory Committee and Fiscal Oversight Commission would review projects, and the Board would evaluate and approve them individually throughout each fiscal year in consideration of available revenue, current acquisition commitments and unencumbered obligations, and other organizational priorities.

This recommended approach maximizes the support and technical assistance staff can provide to community project proponents while still using the Board-approved guidelines and evaluation matrix. The proposed process remains responsive to community needs and is transparent and financially prudent. It also provides staff, advisory bodies and the Board more time and flexibility in selecting and funding individual projects.

**Discussion:**

**Background:**

Through the Sonoma County Agricultural Preservation and Open Space District's Expenditure Plan, Sonoma County voters authorized Ag + Open Space to provide funding to public agencies, nonprofits, and federally recognized tribes for the protection of community open space for local agriculture, recreation and public access, and natural resource restoration through a matching grant program.

Since 1994, Ag + Open Space has accepted 72 Community Spaces projects in each of the county's nine incorporated cities and numerous unincorporated areas, awarding over \$57 million to community-based organizations, cities, County departments, and other public agencies. Generally located in areas lacking open space, this funding has enabled the development and implementation of innovative projects that reflect the unique needs of Sonoma County's diverse communities. To date, Community Spaces has protected over 560 acres of urban open space, created 28 new public parks, and allowed for the restoration and enhancement of over 400 acres of natural habitats, including urban creeks, marshes and wetlands. See the *Community Spaces Map* at [www.SonomaOpenSpace.org/MGP](http://www.sonomaopenspace.org/MGP) <<http://www.sonomaopenspace.org/MGP>> for a list of all projects accepted into the program to date.

As a condition of Community Spaces funding, Ag + Open Space, and thereby Sonoma County residents, achieve permanent protection of lands through a conservation easement, or in some cases long-term access via a trail easement. As the majority of Community Spaces projects include a public recreation component, Ag + Open Space may also receive a recreation covenant that permanently protects public open space and recreational uses.

Ag + Open Space staff has coordinated the program with support from a Community Spaces Staff Committee and the Advisory Committee and Fiscal Oversight Commission. Each funding cycle, the advisory bodies assist staff in developing initial funding recommendations to bring to the Board of Directors, who provide the final determination of projects accepted into the program, along with associated funding amounts.

**Evaluation of Current & Historical Community Spaces Process:**

### **POSITIVE OUTCOMES**

- **Priority Community Support** - The pre-application, priority community outreach, and technical assistance provided enabled organizations to apply who otherwise may have lacked awareness and capacity.
- **Project Diversity** - In 2024, 70% of the projects were in areas lacking open space as identified by our Parks Gap Analysis, 70% were in low-income communities, and 57% were new to the Community Spaces program, which was an improvement over previous years.
- **Robust Project Pipeline** - We are currently discussing potential applications with several different entities and could receive up to five applications in 2025.

### **AREAS FOR IMPROVEMENT**

#### **Project Readiness**

- Funding cycle deadlines incentivize application submittal prior to project readiness, tying up staff and financial resources prematurely and delaying project completion.
- The average project tenure (from acceptance into the program to completion of the project) is **6.5 years**, which exceeds initial grant terms and requires extensions, impacting staff capacity and delaying project delivery.
  - There are 28 active projects, which is **40%** of the 72 total projects accepted into the program since its inception.

#### **Evaluation Process**

- The competitive evaluation process is designed to objectively evaluate projects to make tough funding recommendations based on Board-approved guidelines and limited funding amounts.
- It takes at least six months to launch a cycle, evaluate projects, and present funding recommendations to the Board.
  - This comprehensive process involves staff, the Advisory Committee, Fiscal Oversight Commission, and several public meetings.
- In the last three funding cycles, the Board has recommended full funding for nearly all Community Spaces grant requests, exceeding pre-determined funding amounts.

### **REASONS FOR RECOMMENDED NEW APPROACH**

#### **Increases impact and efficiency of the Community Spaces Matching Grant Program by:**

- Incentivizing applicants to apply when projects are ready, not rushing to meet annual or biennial deadlines
  - Truly ready projects deliver open space to community faster and help staff scale project management and planning
  - Applicants will be able to apply *anytime* when their project is ready
- Following a process that reflects our shared commitment to fiscal prudence and accountability by taking into consideration existing funding commitments and projected revenues
- Reducing unnecessary administrative burdens of having to regularly extend grants for awarded projects that aren't ready to start
- Eliminating conflicts among projects when several new projects are activated at the same time

#### **Adjusting the approach now makes sense because:**

- Community-based organizations, non-profits, and public agencies are making staff aware of future projects, so staff want to communicate changes to potential applicants as soon as possible
- Removing the pressure of deadlines allows organizations to focus on getting projects more ready before applying for funding
- Staff time that would have been used launching the cycle and conducting the evaluation process this year can be used to provide technical assistance to support development of new projects
- A break in "funding cycles" will allow staff to make greater progress in addressing the build-up of

- current active projects (**see Attachment 1**)
- Fiscal Oversight Commission and Advisory Committee members can focus time and energy on an in-depth evaluation of individual projects rather than undertaking another time-consuming competitive evaluation process this year
  - We are actively spending down the Open Space Special Tax Account (OSSTA) Measure F fund balance, so it is critical that all funding decisions are informed by available revenue and obligations (**see Table 1 below**) and other priority projects (**see Attachment 2**). □

**Table 1**  
As of December 31, 2024

Cash by Fund	
OSSTA - Measure F	<b>\$60,836,919 *</b>
Ag + Open Space	1,951,776
AOS Reserve	7,500,000
Cooley Reserve	166,606
IPAOM Available	17,625,045
<b>Total Cash</b>	<b>\$88,080,346</b>
<b>Unencumbered Obligations</b>	
Community Spaces Matching Grant Program Active Projects	<b>\$25,046,855**</b>

\*The 26 conservation easement projects and 28 Community Spaces projects currently in the works will likely use most of this fund balance and staff are relying on the funds for these existing projects.

\*\*We have pledged over \$25M in Community Spaces funds, with more projects on the way.

### **Advisory Committee and Fiscal Oversight Commission Input**

Ag + Open Space staff presented this revised approach to our Advisory Committee and Fiscal Oversight Commission in two separate public meetings. The Advisory Committee was in favor of shifting to a rolling application process with individual project evaluation and funding recommendations. However, some committee members raised concerns about not having limitations on the amount of funding available for individual grant requests. The Fiscal Oversight Commission raised similar concerns and expressed additional concerns that not having an identified funding amount or limitation on individual grant requests could result in Community Spaces projects impacting Ag + Open Space's ability to fulfill the Agricultural Lands, Community Identity, Healthy Community, Water, and Wildland goals and objectives identified in the Vital Lands Initiative.

To address these concerns - and remain accountable to the taxpayers in delivering community open space while being fiscally responsible - Ag + Open Space staff proposes to initiate the rolling application process, □ paying close attention to requested grant amounts, and making fair and reasonable funding recommendations in consideration of available resources and current and anticipated acquisition efforts. If staff finds that applicants are increasingly requesting larger grant amounts and Community Spaces projects are impacting acquisition capacity, staff will return to the Board with recommendations to limit overall funding amounts and/or identify a maximum amount for grant requests.

### **Prior Board Actions:**

December 10, 2024: The Board accepted seven projects into the Program for a total funding amount of \$6,844,426.

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March 5, 2024: The Board of Directors approved revised guidelines and authorized the launch of the Community Spaces Matching Grant Program two-year pilot rolling application program.

October 24, 2023: District Board of Directors approved an update of the Matching Grant Program Guidelines.

August 22, 2023: The Board accepted six projects into the Program for a total funding amount of \$7,209,500.

December 13, 2022: The Board accepted two projects in the Program for a total funding amount of \$1,950,000. The Board launched a new Matching Grant Cycle, 2022 Rd 2, receiving applications from December applications from December 13, 2022 to March 10, 2023 with an allocated budget of \$2,050,000.

March 23, 2021: The Board accepted six projects into the Program for a total funding amount of \$5,805,600

November 12, 2019: District Board of Directors approved an update of the Matching Grant Program Guidelines.

December 6, 2011: Board Action #31 the District Board of Directors approved an update of the Matching Grant Program Guidelines.

August 11, 2009: Resolution 09-0739 the District Board of Directors approved an update of the Matching Grant Program Guidelines.

February 6, 2007: Resolution 07-0110, the District Board of Directors approved an update of the Matching Grant Program.

**FISCAL SUMMARY**

<b>Expenditures</b>	<b>FY 24-25 Adopted</b>	<b>FY 25-26 Projected</b>	<b>FY 26-27 Projected</b>
Budgeted Expenses			
Additional Appropriation Requested			
<b>Total Expenditures</b>			
<b>Funding Sources</b>			
General Fund/WA GF			
State/Federal			
Fees/Other			
Use of Fund Balance			
Contingencies			
<b>Total Sources</b>			

**Narrative Explanation of Fiscal Impacts:**

There are no fiscal impacts associated with approving the revisions. Separately, as Community Spaces projects are presented to the Board of Directors for approval, the funding amount will be determined based on available funding, other acquisition projects, and unencumbered obligations at the time of approval. The fiscal impact will be realized when the Board authorizes the Matching Grant Agreement for each individual project, and those will be budgeted for within the annual budgeting process based upon anticipated closings.

Staffing Impacts:			
Position Title (Payroll Classification)	Monthly Salary Range (A-I Step)	Additions (Number)	Deletions (Number)

**Narrative Explanation of Staffing Impacts (If Required):**

n/a

**Attachments:**

1. List of Active Community Spaces Projects
2. List of Active Acquisition Projects

**Related Items "On File" with the Clerk of the Board:**

1. Community Spaces MGP Guidelines
2. Evaluation Matrix
3. Map of Community Spaces Projects to date