



SUMMARY REPORT

Agenda Date: 5/13/2025

To: Board of Directors of Sonoma County Agricultural Preservation and Open Space District
Department or Agency Name(s): Sonoma County Agricultural Preservation and Open Space District
Staff Name and Phone Number: Simon Apostol, 707-565-4292
Vote Requirement: Majority
Supervisory District(s): Countywide

Title:

As Needed Baseline Documentation and Environmental Services Agreements

Recommended Action:

Approve and authorize the General Manager of the Sonoma County Agricultural Preservation and Open Space District to execute 5 services agreements for Baseline Documentation and Environmental Consulting Services on District-led acquisition projects for a combined contract value not to exceed \$350,000 for three years, ending on June 30th, 2028, with an option to extend for two additional one-year periods as follows:

- A) An agreement with Nomad Ecology, LLC, in an amount not-to-exceed \$60,000.
- B) An agreement with Prunuske Chatham, Inc, in an amount not-to-exceed \$60,000.
- C) An agreement with North Coast Resource Management, in an amount not-to-exceed \$75,000.
- D) An agreement with Swift Biological Consulting, LLC, in an amount not-to-exceed \$80,000.
- E) An agreement with Clifton Environmental LLC, in an amount not-to-exceed \$75,000.

Executive Summary:

Sonoma County Agricultural Preservation and Open Space District (Ag + Open Space) anticipates a continued rapid pace of conservation easement acquisitions over the coming years. All easement and fee title acquisitions, including acquisitions as part of the Community Spaces Matching Grant Program, require detailed documentation of property and resource conditions at the time of closing, otherwise known as baseline documentation.

Additionally, Ag + Open Space acquisition properties contain a diverse assortment of natural resources, including rare plants and animals, aquatic and terrestrial habitat, infrastructure, and existing and potential impacts to these conservation values. In many cases, special expertise is required to accurately document these resources. The recommended contracts are with consultants experienced in forestry, botany, wildlife biology, rangeland science, agriculture, and hydrology.

Discussion:

Ag + Open Space is seeking to enter open-scope contracts with a variety of consultants for as-needed services. Ag + Open Space conservation easements are acquired to protect properties with a wide range of past, current, and planned future uses. Proper documentation of the property's history, sensitive resources, and conditions at closings essential to delivering the conservation benefits intended in the purchase of each conservation easement. Ag + Open Space requires a wide variety of services to support the variety and

volume of acquisition projects anticipated in the next few years. The proposed contracts will secure the availability of experts in areas of resource assessments, environmental impacts, working lands, cartography, and other advanced fields to produce field surveys and baseline documentation.

The primary purpose of these contracts is to provide baseline documentation reports for new conservation easement acquisition projects. In addition to baseline documentation work, proposers were invited to describe their expertise, if any, in the following task areas:

- Forest Condition Assessment, Stand Surveys, and Timber Appraisals
- Wildlife Surveys/Assessments
- Botanical Surveys/Assessments
- Stream/Aquatic Resource Assessment and Classification
- Rangeland Assessment
- Agricultural Lands Health Assessments, Soils, Suitability Analysis
- Road and Trail Management

The 5 firms recommended for the proposed contracts are all qualified to perform at least one, and in most cases several, of these supplemental tasks. The proposed contract amounts reflect anticipated needs for the services available under each contract. For example, a high volume of upcoming forested property easement acquisitions increases Ag + Open Space's need for Registered Professional Foresters to perform baseline documentation, stand health surveys, and timber appraisals. These contracts for services are described in Attachment 1 (List of Contractors and Proposed Contract Awards).

Competitive Selection Process

Ag + Open Space conducted a Request for Proposal (RFP) process to identify and screen qualified consultants for the work described above. The work was divided into three basic tasks and four technical tasks. The RFP was sent to approximately 915 firms and advertised on the Ag + Open Space website and the County Purchasing website. A total of 14 entities submitted proposals for this RFP.

Once a project or technical need has been identified, staff will reach out to consultants to describe Ag + Open Space's needs under the open scope agreement. Specific details of each work assignment will be determined during project initiation, including the specific project scope of work, schedule for completion of the project scope, and the proposed cost. Staff will then prepare a Task Order (see sample in Attachment 7) to memorialize these terms. The Task Order must be signed by District staff and the Consultant prior to the onset of work. The District does not guarantee any minimum or maximum amount of work under the as-needed agreements. One advantage of selecting multiple service providers is the ability to request cost estimates from a pre-approved group of consultants in order to keep the cost and quality of work competitive across many markets.

Local Preference

Firms local to Sonoma County were given a 5% increase to their total score. Two of the five firms selected are based in Sonoma County, with the remaining three in Mendocino and Contra Costa County. Experience working in Sonoma County and in nearby counties was also considered by the evaluation committee.

Strategic Plan:

Acquisition of new conservation properties, whether through fee title ownership or the establishment of a conservation easement, has a significant impact over the management of these lands and the potential future loss of natural habitats with carbon sequestration benefits. Adequate documentation and understanding of these resources at the time of acquisition helps inform future management and the design of permanent protections.

Racial Equity:

Was this item identified as an opportunity to apply the Racial Equity Toolkit?

No

Prior Board Actions:

N/A

FISCAL SUMMARY

Expenditures	FY24-25 Adopted	FY25-26 Projected	FY26-27 Projected	FY27-28 Projected
Budgeted Expenses	\$50,000	\$100,000	\$100,000	\$100,000
Additional Appropriation Requested				
Total Expenditures	\$50,000	\$100,000	\$100,000	\$100,000
Funding Sources				
General Fund/WA GF				
State/Federal				
Fees/Other	\$50,000	\$100,000	\$100,000	\$100,000
Use of Fund Balance				
General Fund Contingencies				
Total Sources	\$50,000	\$100,000	\$100,000	\$100,000

Narrative Explanation of Fiscal Impacts:

Ag + Open Space has adequate appropriations in its FY 24-25 budget for the \$50,000 in contract expenditures. Appropriations will be requested for \$100,00 in FY 25-26, FY 26-27, and FY 27-28 in the recommended budgets.

Narrative Explanation of Staffing Impacts (If Required):

Agenda Date: 5/13/2025

N/A.

Attachments:

1. Notice of Intent to Award
2. Professional Services Agreement with Nomad Ecology, LLC
3. Professional Services Agreement with Prunuske Chatham, Inc.
4. Professional Services Agreement with North Coast Resource Management
5. Professional Services Agreement with Swift Biological Consulting, LLC
6. Professional Services Agreement with Clifton Environmental Services, LLC

Related Items “On File” with the Clerk of the Board:

N/A