

Response to Grand Jury Report Form

Report Title: A Review of Sonoma County Agricultural Preservation and Open Space
District: It's On Their Website

Report Date: April 30, 2026

Response by: Rebecca Hermosillo Title: Chairperson

Agency/Department Name: Sonoma County Board of Supervisors/Ag+ OS Board of
Directors

FINDINGS:

I (we) agree with the findings numbered: **F1, F2**

I (we) disagree wholly or partially with the findings numbered: **F3**

(Attach a statement specifying any portions of the findings that are disputed with an explanation of the reasons.)

RECOMMENDATIONS:

- Recommendations numbered: **R1** have been implemented.
(Attach a summary describing the implemented actions.)
- Recommendations numbered: **R2** have not yet been implemented but will be implemented in the future.
(Attach a timeframe for the implementation.)
- Recommendations numbered: _____ require(s) further analysis.
(Attach an explanation and the scope and parameters of an analysis or study, and a timeframe for the matter to be prepared for discussion by the officer or director of the agency or department being investigated or reviewed, including the governing body of the public agency when applicable. ***This timeframe shall not exceed six months from the date of publication of the Grand Jury report.***)
- Recommendations numbered: **R3** will not be implemented because they are not warranted or are not reasonable.
(Attach an explanation.)

Date: _____

Signed: _____

Findings:

F3. The Recorder's Office does not notify Ag+OS when ownership of a protected property changes. This may impair Ag+OS stewardship of a conservation easement.

Response: Partially Disagree

While the Recorder's Office does not notify Ag+OS when ownership of a protected property changes, Ag+OS has a procedure to check for changes in ownership, as described in the response to R3. The Recorder's Office has a public grantor / grantee (name) index available online, as mandated by law, which provides legal constructive notice to the public regarding recorded documents and changes in ownership.

Recommendations:

R1. By August 1, 2026 the Ag+OS Board of Directors/Board of Supervisors direct Ag+OS staff to include notification of Board of Directors meetings, with a link to the agenda, in the location established on its website for Public Meeting announcements. (F1)

Response: Has been implemented

Ag+OS staff have updated the website to include notification of Board of Directors meetings with a link to the agenda on the Public Meetings page here:
www.sonomaopenspace.org/public-meetings

R2. By August 1, 2026 the Board of Supervisors direct the Auditor-Controller-Treasurer-Tax Collector and the Administrator of the Sonoma County Employees' Retirement Association Investment Managers to collaborate in pursuing a higher rate of return on the Ag+OS Stewardship Reserve Fund and report their recommendations to the Board of Directors by December 31, 2026. (F2)

Response: Implemented in the future

The Board agrees that a greater rate of return is necessary to meet the long-term goal for perpetual stewardship. In conjunction with the Auditor Controller Treasurer Tax Collector (ACTTC), Ag+OS released a request for proposals for a discretionary Investment Advisor on March 24, 2026. Once selected, the Investment Advisor will be charged with investing the Stewardship Reserve within the confines of the current County Investment Policy. Additionally, the ACTTC plans to amend its Policy to specifically allow Ag+OS to invest in certain securities with maturities of up to ten years, as permitted under Government Code Section 53601. Ag+OS and ACTTC will return to the Board of Directors by December 31, 2026, to award the contract for Investment Advisor services.

There is a potential to invest these funds outside the County Investment Policy, but doing so would require a California State legislative change. Should ACTTC and Ag+OS determine that is the best course of action, staff will consult the Sonoma County Employee Retirement Association to better understand and learn from their experience with that process.

R3. By August 1, 2026 the Board of Supervisors direct the Recorder's Office to flag properties under Ag+OS Stewardship and create a system to notify Ag+OS of changes in ownership within 30 days of recording. (F3)

Response: Will not be implemented as recommendation is not warranted

It is critical for Ag+OS to identify properties that have changed ownership as soon as possible after that change occurs, so that easement stewardship activities are not interrupted. Though many landowners apprise Ag+OS staff when a sale is pending or completed, sometimes ownership of a property will change without staff's knowledge. The Recorder's Office's current system is unable to flag Ag+OS property interests and notify Ag+OS when ownership of a property changes. However, Ag+OS has implemented the following procedure to check for changes in ownership. Every 90 days, an Ag+OS GIS Analyst conducts an automated search of the parcel database for Ag+OS interests and compares those data to recent sales and merger records, then shares the search results with the Stewardship Supervisor. Stewardship staff then send out a welcome letter to new landowners, requesting a meeting (that typically would include a monitoring visit) for staff to provide an overview of the easement terms and time to discuss the new landowners' plans for the property. In this way, staff are able to answer any questions and address any concerns in a timely manner.

The Recorder's Office provides constructive notice to the public regarding recorded documents through an online grantor / grantee (name) index, as mandated by law. The Recorder's Office does not track ownership activity by parcel number, address, property location, usage or restrictions. While a limited number of recorded documents do include Assessor Parcel Numbers (APNs), which are indexed for interagency assistance, there is not a way to produce reports or histories based on parcel activities. It should be noted that some transfers of ownership do not occur via recorded documents, or are done via documents that do not have APNs required on them, and individuals researching properties are warned that APNs should not be relied on for accurate and complete title searching. The Recorder's Office has made the grantor/grantee index and all the associated documents available to all county departments and employees, who are able to search via grantor/grantee or APN (if indexed), at any time.