



SUMMARY REPORT

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**Agenda Date:** 4/14/2026

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**To:** Board of Directors of the 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:** Misti Arias, General Manager (707) 565-7360  
**Vote Requirement:** Majority  
**Supervisorial District(s):** Countywide

**Title:**

Enterprise Systems Modernization & Efficiency Implementation

**Recommended Action:**

Authorize the General Manager of the Sonoma County Agricultural Preservation and Open Space District to execute a services agreement with Provisio Partners Illinois LTD, for an enterprise software build totaling \$221,500 effective for two years ending on April 30, 2028.

**Executive Summary:**

As part of evolving land conservation efforts and our commitment to better support our community and partners, the Sonoma County Agricultural Preservation and Open Space District is updating its technology systems to streamline and modernize operations. These updates include conducting a competitive procurement process for software solutions and selecting Provisio Partners Illinois LTD to build and implement a platform to manage outgoing grants through the Community Spaces Matching Grant Program, process incoming conservation easement applications from prospective landowners, and handle form submissions from current conservation easement landowners seeking permitted use requests.

**Discussion:**

In 2023, the Sonoma County Agricultural Preservation and Open Space District (Ag + Open Space) adopted a Salesforce-based data management software, LOCATE, to establish clear, consistent, and streamlined workflows; centralize property-based records for the purposes of tracking and reporting; and eliminate redundant data entry throughout the life of a conservation project. In doing so, Ag + Open Space was intentional in seeking a software solution that would allow for other functions, including grant management, project mapping, and landowner engagement. This recommended solution from Provisio Partners Illinois LTD (Provisio) is a significant advancement in the development of the software system proposed to streamline organization-wide operations.

Utilizing Ag + Open Space's existing Salesforce environment, the additional software implementation will modernize and streamline management of the Community Spaces Matching Grant Program and processing of conservation easement applications and landowner permitted use requests. The system will use role-based access controls to ensure staff, reviewers, leadership, the community, and other external stakeholders access only data and actions appropriate to their role. The system will integrate with Ag + Open Space's existing land-

based technology ecosystem, LOCATE, and include Esri ArcGIS integration capabilities.

This approach maximizes flexibility, aligns with existing workflows, and positions Ag + Open Space for long-term success. The proposed system will improve transparency by centralizing program information, application materials, and status tracking into a single, accessible platform. This effort is consistent with the Board-adopted workplan, which prioritizes providing technical assistance and streamlining systems to improve program delivery. Applicants for the Community Spaces Matching Grant Program will be able to view clear eligibility criteria, submission requirements, and timelines, reducing ambiguity and improving the overall user experience. In addition, standardized workflows and consistent data capture will make it easier to generate reports, respond to public inquiries, and provide the Board with timely, accurate insights into program activity, funding distribution, and project outcomes.

By automating routine administrative tasks and replacing manual, paper-based, spreadsheet-based or email-driven processes, the system will substantially reduce staff workload. This investment directly advances the Board's direction to streamline internal processes and expand technical assistance to applicants and landowners. Functions such as application intake, eligibility screening, document collection, routing for review, and approval tracking will be streamlined through configurable workflows. This will minimize duplicative data entry, reduce the risk of errors, and eliminate the need to manually track submissions across multiple systems. Staff will also benefit from centralized records and searchable data, allowing faster retrieval of information and more efficient coordination across teams. As a result, staff can shift time away from administrative processing toward higher-value work, such as project evaluation, landowner engagement, and strategic program development.

Provisio will build an organization-wide system within Ag and Open Space's existing Salesforce environment to modernize and streamline grants management, conservation easement applications, and landowner use requests, which will include integration with existing systems. The project is expected to take 21 weeks to complete. At this time, Ag + Open Space does not anticipate further post-project support.

### **Recommended Solution Architecture**

The recommended solution architecture includes the following components:

1. Community Spaces Matching Grant Program Lifecycle Management: a comprehensive system to manage the full lifecycle of the Community Spaces Matching Grant Program, including Funding Opportunity Management, Online Applicant Portal, Application Management, Award Management, Budget Management, Outcome Management, Program Dashboard
2. Conservation Easement Application: Public-facing portal page allowing conservation easement applicants to submit applications to conserve their land.

3. Landowner Permitted Use Request Application: Public-facing portal page allowing landowners to submit permitted use requests.
5. Key Data Management and Reporting: 360-Degree stakeholder view, dashboards and analytics. □
6. Integration Capabilities: API-Driven Integration that will integrate with existing the Salesforce application, □ LOCATE, as well as Esri ArcGIS Online. Esri ArcGIS Online integration will enable embedding of property web maps within LOCATE and near real-time updates to web maps as records are updated in LOCATE. The system is designed with the potential to integrate with other external systems in the future.

### **Competitive Selection Process**

Ag + Open Space conducted a competitive Request for Proposal (RFP) process to identify qualified contractors for this work. The RFP was distributed through the County Purchasing notification system, sent to nearly 605 suppliers, and advertised on both the Ag + Open Space and County Purchasing websites. Staff responded to 140 questions in a first addendum, hosted a demonstration with Q & A webinar, and issued a second addendum with 10 question responses. A total of 13 entities submitted proposals.

An evaluation committee composed of internal and external staff independently reviewed and scored all proposals using pre-established selection criteria. The committee interviewed shortlisted candidates and selected the contractor deemed most capable of delivering the required services.

The selected contractor, Provisio, submitted a responsive proposal that clearly addressed Ag + Open Space's needs and thoughtfully responded to the requirements outlined in the RFP. Additionally, Provisio is a Salesforce Summit Consulting Partner, the highest designation within the Salesforce ecosystem. Provisio has successfully completed more than 625 projects for over 300 organizations nationwide, and their team holds more than 380 Salesforce certifications. This depth of expertise ensures solutions that are technically sound, strategically aligned, and designed for long-term governance and adoption.

Additionally, their experience includes extensive work with nonprofits and government agencies of every size. Their work highlights include grants-management platforms, program-management solutions, intake and referral portals, and data strategies that help organizations measure outcomes and demonstrate impact. Their work in this area has provided a nuanced understanding of how funders, agencies, and service providers operate and how to translate those requirements into technology that reduces administrative burden, fosters collaboration, and improves visibility for leadership, staff, and external partners.

### **Strategic Plan:**

**Pillar:** Organizational Excellence

**Goal:** Goal 1: Strengthen operational effectiveness, fiscal reliability, and accountability

**Objective:** Objective 2: Establish a master list of technology needs that support operational/service improvements by mid-2022, identify enterprise solutions, and develop fiscal strategies to fund and implement improvements.

**Racial Equity:**

N/A

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

No

**Prior Board Actions:**

N/A

**FISCAL SUMMARY**

| <b>Expenditures</b>                | <b>FY 25-26<br/>Adopted</b> | <b>FY 26-27<br/>Projected</b> | <b>FY 27-28<br/>Projected</b> |
|------------------------------------|-----------------------------|-------------------------------|-------------------------------|
| Budgeted Expenses                  | \$50,000                    | \$171,500                     |                               |
| Additional Appropriation Requested |                             |                               |                               |
| <b>Total Expenditures</b>          | <b>\$50,000</b>             | <b>\$171,500</b>              |                               |
| <b>Funding Sources</b>             |                             |                               |                               |
| General Fund/WA GF                 |                             |                               |                               |
| State/Federal                      |                             |                               |                               |
| Fees/Other                         | \$50,000                    | \$171,500                     |                               |
| Use of Fund Balance                |                             |                               |                               |
| Contingencies                      |                             |                               |                               |
| <b>Total Sources</b>               | <b>\$50,000</b>             | <b>\$171,500</b>              |                               |

**Narrative Explanation of Fiscal Impacts:**

There is \$50,000 appropriated in the FY 2025-2026 budget to initiate the build and the remaining \$171,500 is included in the projected FY 2026-2027 budget.

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

N/A

**Attachments:**

1. Contract with Provisio Partners Illinois LTD

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

N/A