



Lopez Sound Farm and Forest Preserve Request for Letters of Interest (LOI)



LOI ISSUED MARCH 25, 2021
Please respond on or before 5 p.m. May 5, 2021

Issued by Lopez Community Land Trust - EOE

1.0 Project Background

Lopez Community Land Trust (LCLT) was founded in 1989 with the expressed goal of building a diverse, sustainable island community. A key purpose of the organization is to acquire and hold land in trust in order to provide permanently affordable access to land for quality affordable housing, sustainable agriculture, forestry, cottage industries and cooperatives while developing and exercising responsible ecological practices.

LCLT is seeking a long-term lessee(s) for the Lopez Sound Farm and Forest Preserve on Lopez Island. We do not intend to sell the land at any point. The land will be forever held in trust. The address is 2062 Lopez Sound Road and guided tours are encouraged prior to submitting an LOI. The entire Preserve is 42.74 acres. 21 acres is pasture and 21.74 acres is forest. To the south and east the property abuts the 475-acre Lopez Hill Preserve owned by SJC Land bank and placed in Forever Wild status. LCLT is working with the SJ Preservation Trust on an easement for the pasture and forest retained by LCLT. And looking at the feasibility of community solar on the site.

The property is currently undeveloped with the exception of a new electric transformer with metered service, an unused three-bedroom septic and a spring fed well. Each site will have its own dwelling unit, electric meter and will share an entrance driveway and potable water source.

Access trails through the forest to the 475-acre Lopez Hill Preserve will be developed away from homestead and farm activities to create a sense of privacy.

The applicant may represent an individual, couple, family or a cooperative. The lessee must be willing to commit to a minimum 5-year lease with the desire to enter into a longer-term lease (up to a life time).

This Request for a LOI is seeking responses from up to two distinct parties.

- 1) An interested party with assets who is willing to partner with LCLT to plan and develop farm infrastructure and two residences for full time occupancy – including one residence for themselves and one residence for a primary farmer. Applicants must be willing to enter into a long-term lease with LCLT and either upon death or moving from the land, grant the assets to LCLT.
- 2) An interested party who is interested in developing a farm enterprise and is willing to plan the farm operation, create a business plan, live full time on site and be committed to the development of a successful, dynamic, ecologically balanced and viable enterprise that meets the following:
 - Incorporate farm practices that improve the soils;
 - Strengthen the local food system through access to local foods and farm products, which may include value-added products;
 - Retain and invigorate the working rural character of Lopez Island through regenerative economic and agriculture practices;
 - Strengthen the local economy

Both parties are asked to cooperate with LCLT to explore periodic planned community access and classes on the farm, possibly internships.

2.0 Project Timeline 2021

LOI is due by 5 p.m. MAY 5, 2021.

LCLT will contact you on or before May 15, 2021 to discuss your LOI and next steps.

We are, so to speak, making this road while walking it. LCLT is looking for collaborative partners and at some point will coordinate a meeting between up to two distinct parties and discuss compatibility of philosophy, dreams and vision, practical components of a business plan, site planning, housing, timeline and other pertinent information.

3.0 Specifications

The initial stage simply requires a Letter of Interest (LOI) up to 3 typed pages.

LCLT is considering leasing two distinct zones: one lease for a 20 acre farm enterprise and homestead, and a separate lease for a one acre homestead. Depending on the enterprises being developed (think mushrooms) we may make a portion of the 22 acre forest available. A lease gives you rights and responsibilities that will be negotiated through a fair process, including the possibility of an equity formula associated with capital improvements, maintenance and replacements.

In the LOI please include the following information:

- a) Name, address, phone and email contact for the primary contact person(s) as well as each person involved in the enterprise.
- b) A paragraph or two that summarizes what you are offering, what you are wanting and what inspires you about this project.
- c) A statement on what attracts you to seek access to a long-term lease of farmland/farm and forest. And why leasing land is particularly attractive to you. Please voice any concerns, questions and observations you have about leasing land as opposed to owning it fee simple.
- d) Some background on your aptitude and experience pertaining to this project including at least two references.
- e) Your approach to stewarding the land at Lopez Sound Farm & Forest Preserve i.e., activities and land philosophy.
- f) Specifically, who will do the actual work/live on the land.
- g) Your willingness to collaborate with LCLT in periodic training and education programs.
- h) A statement on how you (and members of the team) plan to support yourself(s) financially either off the farm, on the farm or combination thereof.
- i) Whether you are responding to the LOI as a investor partner with LCLT, or a farmer or both.

In addition to the three pages or less, please include a very brief Personal Financial statement with the following:

-Name of each principal person who will be engaged and;

1. **Annual gross income** of each person: a) <\$25,000 b) between \$25,000 & \$50,000 c) >\$50,001.

2. **Description of assets** held by each person and the total value associated with each person: a) <\$25,000 b) between \$25,000 & \$50,000 c) >\$50,001
3. **Description of the debt** held by each person and the total debt associated with each person: a) <\$25,000 b) between \$25,000 & \$50,000 c) >\$50,001

A full credit report will be requested at a later stage, but if you have questionable or no credit, please make a statement now.

All information provided will be kept confidential.

This LOI is only requesting the above. Additional information will be requested should we decide to go forward. An example of information required later is stated below.

After acceptance of LOI – FOR REFERENCE ONLY

The farm enterprise will need to create a farm management and business plan including both minimum and maximum production on the land. The maximum production limits would ensure that the farm is not pushed beyond carrying capacities (an ecological consideration) or intensity of development (a social and aesthetic consideration). The minimum production standard would ensure that the farm is able to support the defined goals both ecologically and economically. If you need help creating a business plan the Northwest Agriculture Business Center is one resource.

This information is NOT required with the LOI but is listed here to help you prepare if we decide to move forward after the LOI review. The farm plan will need to specifically address the following:

- 1) How the enterprise will fit the size and configuration of farm, improve the soils and help feed the local community;
- 2) How the farm plan will fit into the existing local farm products offered and whether it will compete and/or compliment existing local markets;
- 3) Methods utilized for resilient and sustainable farming given changes in climate, water and food systems. Please be specific if you use a signature form of agriculture such as biodynamic, organic, etc.
- 4) Strengthen the local food system and access to local foods;
- 5) Describe working the farm i.e. animals, market garden, value-added, classes, etc., including available markets and a three-year income and expense projection of your proposed farm operations;
- 6) Describe your philosophical approach to stewardship of the land including what experience you have in land stewardship and who/what you draw your inspiration from;
- 7) Qualifications that indicate you can successfully execute your business and management plan.
- 8) A description of your (team members) carpentry and mechanical aptitude (if any);
- 9) Willingness to collaborate with LCLT's intern and other life skill educational programs as well as ideas you may have, and
- 10) Explain why you should be chosen for this position.

11) Explain or describe any other aspects you feel the need to address.

Clearly describe the management structure you are proposing i.e. LLC, Sole Proprietorship, Cooperative, etc. including the role of each person. Describe the background and experience of each person, including business and farming experience as well as related skills such as mechanical, planning, etc. that will help with farm operations and maintenance. Name one person who will serve as the point of contact.

4.0 LOI Instructions

Included with the up-to-three-page response, respondent shall submit the following additional information with the response.

Availability

Detail the time frame for availability for moving to the farm.

Contact Information and references

INCLUDE:

Name, address, phone and email contact for the primary contact person.

5.0 Submittals, Inquiries, and Other Communication

Please contact LCLT at the phone number or email below with questions about the LOI or if you would like to set up a tour.

Submit **one electronic copy** of the proposal (Word, Excel or PDF format) to:

LCLT@rockisland.com Attn: Sandy Bishop

It is the sole responsibility of the Respondent to see that its LOI proposal is received by **the due date**. LCLT will respond within 24 hours to acknowledge receipt. If you do not hear from us please contact LCLT at 360.468.3723 or email LCLT@rockisland.com.

Resources that might be of interest:

NW Ag Business Center

WSU Extension

SJC Ag Resource Committee

Whidbey Island Organic Farm School

Equity Trust