

Farmland for All buy-protect-sell program pilot

Buyer selection process and criteria

Step 1. Identify pool of qualified buyers

Before selecting a buyer for a specific property, Ag + Open space will develop a pool of qualified buyers who meet a minimum threshold of required experience. Applicants will complete a simple initial application which will assess their experience and qualifications. This initial application will not be tied to any specific property. A Buyer Assessment Committee consisting of Ag + Open Space staff and representatives of expert organizations and stakeholder groups will review the applications and will screen applicants based on whether they meet the required threshold.

The application will be available in print and online via the Ag + Open Space website in English and Spanish. Ag + Open Space will work to provide translation into other languages as needed.

Support for applicants

Ag + Open Space staff will offer support to all applicants as they complete the initial application. Support will be available in English and Spanish, as well as other languages as possible.

Eligibility and authorization

Eligible applicants may be any type of legal entity qualified to hold land. Applicants could include individuals, nonprofits, LLCs, cooperatives, or tribes. Applicants, such as non-profits or businesses, who are organized as corporations (rather than individuals) must have a clear organizational and decision-making structure and must demonstrate that the application is prepared and authorized consistent with corporate governance.

All corporate or other non-individual applicants must submit a formal board resolution or other formal statement issued by their governing body authorizing their application. They must also provide copies of current bylaws, operating agreements, and other governance documents as requested by Ag + Open Space in order to inspect their corporate management structure.

Minimum qualifications

For the pilot of the buy-protect-sell tool, we believe that operators with moderate to significant experience with farming or ranching will have the greatest likelihood of establishing and/or supporting long-term successful farm business(es) on a property, thus fulfilling the program goals.

Therefore, to enter the qualified buyer pool, applicants must demonstrate knowledge and experience sufficient to successfully operate a farm or ranch property. This would typically consist of a minimum of 5 years of relevant experience, which might include:

- Farmworker experience/farm employment
- Farm or ranch management or operation
- Indigenous land management experience

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- Farm incubator training,
- Farm apprenticeship
- Living and/or working on a family farm or ranch
- FFA or 4-H experience
- Small business management
- Other similar experience

Applicants will have the opportunity to explain how their lived experience, qualifications, and/or education are relevant and how what they have learned from it will apply to this opportunity.

Applicants **are not** required to own, or have owned in the past, their own property or farm business.

Initial application process

- The initial application will collect information on each applicant's experience and qualifications and will not be tied to any specific property.
- Applicants may submit their application to join the qualified buyer pool at any time, whether or not a specific property is currently available.
- The application will be available in print and online via the Ag + Open Space website in English and Spanish. Ag + Open Space will work to provide translation into other languages as needed.
- Applications will be assessed by the Buyer Assessment Committee, which will consist of Ag + Open Space staff and representatives of expert organizations and stakeholder groups. For this pilot program, review will occur on a rolling basis.
- The application will investigate:
 - Whether the applicant meets the required minimum threshold of relevant qualifications and experience (see "minimum qualifications" above).
 - The type of property the applicant is interested in, for example size range, location within the county, or suitability for a particular production system.
 - This information will be collected anonymously and all qualified applicants will be notified of every available property.
 - The kind of land applicants indicate an interest in may guide what properties Ag + Open Space prioritizes for this pilot and for a long-term buy-protect-sell program in the future.
- Applicants who meet the threshold to enter the qualified buyer pool will be notified. These applicants will be invited to participate in the application process when a specific property becomes available for purchase.

Step 2. Select buyer for specific property

Ag + Open Space will identify a specific buyer for the property via a proposal assessment process. All entities and individuals who have been accepted into the qualified buyer pool will be invited to participate. The goal will be to identify a long-term owner who demonstrates strong potential to develop or support a successful agricultural operation(s) on the property, and whose vision for land management and community engagement aligns with program goals. Applicants will be assessed at each stage of the proposal assessment process by a Buyer Assessment Committee consisting of Ag + Open Space staff and representatives of expert organizations and stakeholder groups. The Committee will assess each applicant

based on their **qualifications, vision, readiness, and other characteristics**, each of which are described in more detail below (see “Buyer Selection Criteria”).

Support for applicants

Support will be available to all applicants as they participate in the application process. As the pilot progresses, Ag + Open Space will investigate the needs of applicants and will identify resources and support that are responsive to these needs. This support may include working with partners and local experts to provide educational workshops to help applicants navigate the stages of the application process. Support will be made available in both English and Spanish to the extent possible, and it may be possible to provide help in other languages as needed.

Buyer selection criteria

Qualifications

Applicants are not required to fulfill all of the following criteria. Assessment of these qualifications will be used to compare between applicants.

Farm or ranch operation

- Applicant’s level of experience with, and relevant qualifications for, farm or ranch operation or management, or other equivalent or relevant experience, over and above the minimum threshold required to enter the qualified buyer pool.

Sales/marketing experience

- The ideal applicant will have experience selling their own products/produce to their target market, with established marketing connections/reputation; however, other experience (ex: marketing others’ products, marketing for a small business) could also count toward this qualification.

Experience and ability in other relevant areas

- Public outreach/education
- Farmer-to-farmer collaboration
- Resource stewardship/ecological stewardship
- Working with funding/grant programs
- Working within regulatory requirements and certification programs
- Managing employees, if relevant given property size
- Business planning/management, for example having successfully kept records for a business or having taken a course in business planning (for an agricultural or non-agricultural business)
- Financial skills and loan management, for example having successfully managed a loan in the past or having taken a course in these skills
- Record-keeping
- Knowledge and experience of Sonoma County’s local market, regulatory, and other conditions, for example from working in or near Sonoma County

Vision

Interested applicants will be invited to submit a property-specific Farm Business Proposal outlining their vision for a specific identified property (see “Proposal” below under “Buyer selection process”). The Proposal will outline the applicant’s planned activities on the property and a basic business plan. The

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applicant's vision for the property will be further explored through an interview. Their vision will be assessed by the Buyer Assessment Committee based on whether it is suitable for the property; its potential for success; and its potential to forward the goals and objectives of Ag + Open Space and the Farmland for All program, including via community benefits.

Suitable for property

- Does the proposed level of production match the land's productive capacity?
- Are the proposed crops/livestock/etc. a good fit for the property's climate, topography, etc.?
- Do the proposed agricultural practices match the existing resources and constraints of the property (ex: does the plan account for soils that are prone to erosion or constraints on water availability)?

Potential for success

- How will the applicant develop or support a financially viable farm business(es)? Does the Proposal account for the price of the land and associated payments (including property taxes)?
- Does the Proposal describe how to access capital required for initial investments like acquisition costs, inputs, infrastructure, and equipment (ex: tractor access, soil amendments)?
- Does the Proposal identify a target market for proposed sales? Do the proposed products match demand?
- Does the Proposal include sales strategies that will be successful on the property (ex: relying solely on a farmstand in a remote location may be less viable)?
- Does the Proposal address the labor needs for implementation of the proposed vision relative to the acreage of the property?
- Does the Proposal realistically match the skills of the applicant, or can the applicant explain how they will acquire the necessary skills to execute the proposal?

Community benefits

A Proposal will not need to provide all of these community benefits in order to be successful; rather, the potential to provide one or more community benefits may be given preference if comparing similarly qualified candidates.

- Enhancement of agricultural values: How does the applicant propose enhancing soil health? Infrastructure such as water storage? Pollinator habitat? Other ag values?
- Enhancement of natural resources/ecosystem services: Does the applicant propose enhancing features like wildlife habitat, riparian areas, or areas of native plants?
- Enhancement of resilience to climate change: Does the applicant propose growing drought or heat resistant crops? Will they build soil health and water holding capacity? Does the Proposal incorporate regenerative or similar environmentally beneficial practices?
- Commitment to Equity: Will the applicant's use of the land benefit low income communities and communities of color? How?
- Local food security: Will the farm/ranch provide fresh food? Will it be accessible for local communities with limited access to fresh products? Does the Proposal address equitable food access (for example discounts for SNAP recipients)?
- Diversity of local agricultural products: Does the Proposal enhance the diversity of products, including culturally appropriate products, available to local communities?
- Diversity of local agricultural practices: Does the Proposal incorporate culturally-specific or Indigenous agricultural or land management practices?
- Outreach/education: Is the applicant open to occasional public access or events on the property? Do they have experience with community outreach/education? Have they mentored other farmers?
- Other benefits and considerations.

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Readiness

Candidates will need to demonstrate their readiness to purchase the property and successfully operate it if selected. If comparing between otherwise similarly qualified candidates, candidates who can be financially ready to buy the property within a shorter time frame will be preferred.

- Does the applicant have a plan to access the capital required to purchase the property?
- Has the applicant been preapproved for a loan to purchase the property? This is not required but is preferred.
- Does the applicant have a plan to access the capital required to make any proposed improvements to the property (for example, adding or upgrading infrastructure)?
- Does the applicant have access to the equipment needed to operate the property as described in their Proposal, or a plan to access this equipment?
- Does the applicant have a financially viable plan to begin implementing the Proposal on the property (for example, a plan to purchase initial inputs and make subsequent reinvestments in the farm business)?
- Ag + Open Space will reach out to local agricultural finance providers to further refine the criteria used to assess financial readiness.

Other criteria

Applicants are not required to meet all of these criteria. They will be used to compare between similarly qualified candidates.

- Does the applicant reside or work in a disadvantaged area?
- Would this be the applicant's first time owning land?
- What motivations or needs led the applicant to apply to the program? What elements of their lived experience or history led them to be interested in agricultural production? How will the program make a difference in their ability to achieve their goals?

Buyer selection process

Invitation to apply

Once a specific property is identified and a purchase agreement is signed with the seller, all applicants in the qualified buyer pool will be invited to apply and will be provided with information about the property available for purchase, including:

- Preliminary title report
- Water and soil information
- Infrastructure list
- Any other property assessments or studies
- Any identified goals, priorities, or potential concerns which candidates will be expected to consider in their Proposal, for example if the property has been identified to provide a strong opportunity for education/outreach or soil health enhancement
- Terms and conditions of the sale, including:
 - Purchase and sale agreement
 - Sale price
 - Conservation easement
 - Agricultural conservation covenant
 - Affordability covenant (if applied)

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To maintain the fairness and integrity of the program for all applicants, the conservation easement, agricultural conservation covenant, affordability covenant, and any other contracts with Ag + Open Space **will not be subject to negotiation**. Interested applicants will need to review them very carefully and will be encouraged to ask questions before investing further in the process. Applicants will be required to sign an acknowledgement of the terms of these documents.

Site visit

Interested applicants will be invited to attend a mandatory site visit, where they can view the property and ask additional questions. Attendance at the site visit will be a required part of the application process. This site visit will be conducted in English and Spanish, as well as other languages as needed and feasible.

Proposal

Following the farm visit, applicants will be invited to submit a property-specific proposal describing their farm business plan and vision for management of the property. Ag + Open Space will develop an optional template for the Proposal. The Proposal will include categories such as the following:

- A general ag production plan
- A sales/marketing plan for ag products
- Plans for any other on-farm income streams
- Major expected expenses such as infrastructure improvements or equipment purchases and plans to finance them
- Brief description of other potential uses for the property, such as outreach and education, peer mentorship, habitat restoration, etc.
- Discussion of financial readiness, including a plan to access capital for purchase of the property and for initial investments such as infrastructure improvements
- Description of how the proposal meets the goals and objectives of Ag + Open Space and the Farmland for All program in particular, including (if applicable) how it will provide community benefits (see “Community benefits” under “Buyer selection criteria” above).

The Buyer Assessment Committee will review the proposals and assess them based on the criteria above (see “Buyer selection criteria”).

Interviews

The Buyer Selection Committee will then conduct one or more rounds of interviews with top applicants. The Committee will assess the applicants based on the criteria above (see “Buyer selection criteria”).

Selection and award

The Committee will make a recommendation to Ag + Open Space regarding which applicant(s) are best qualified to own and operate the property. If, after the proposal assessment process and the interview(s), multiple qualified and competitive applicants are identified, final selection will be made via a lottery that will be administered in an open meeting pursuant to protocols and best practices to ensure fairness and transparency.

Ag + Open Space staff will present the selected candidate, along with any comments and suggestions from Ag + Open Space’s Advisory Committee and Fiscal Oversight Commission, to Ag + Open Space’s Board of Directors. Based upon the information presented, a final determination will be made by the Ag + Open Space Board of Directors.