Leavey Ranch RFP Questions and Answers

Q: We are interested in partnering with another Tribe in our proposal submission for Leavey Ranch RFP and wanted to confirm this would be allowable.

A: Yes, we encourage partnerships, however the property would be granted to a single entity, so we request that the receiving entity be identified in the proposal.

Q: Beyond the tenants and previous relationship with Cal Poly Humboldt, are there any other ongoing partnerships associated with the property particularly as related to historically excluded populations, research, or education (e.g. area tribes, educational institutions, etc)? If so, please briefly describe. Are any of these entities interested in continuing to partner with a new property steward?

A: While the only local institution we have formally partnered with is Cal Poly Humboldt in the form of facilitating academic research, we have worked with representatives from several tribal groups on projects such as a visit to gather basket-weaving materials and the transfer of redwood logs to be used for cultural purposes. Prior to the COVID-19 pandemic staff were considering more ambitious partnerships including a cultural burn for native species restoration. For the past three years we have also worked with a local organic farmer to harvest and donate fruit from the Leavey Ranch orchard to a local food bank.

Q: How do I request additional information and documentation related to the RFP?

A: Please email leaveyranchrfp@nrhythm.co and submit your request. We have additional documentation available on request. You will be required to agree to a non-disclosure agreement to receive the additional information.

Q: Can I ask about some of the financial details of the Endowment, such as how is the Endowment invested and what is the capitalization rate?

A: A summary of this information and other financial details is available by request. This includes information on the endowment as well as other revenue and expenses projections for the operations of the ranch.

Q: Will the foundation take a management fee for the continued administration of the endowment?

A: Yes, 1.75% will go to administration fees. This is the same for all endowments at the foundation. The annual payout ranges between $120k-$140K per year.

Q: Is any interest diverted to the voluntary honor tax?

A: Any gains from the fund stay in the fund. We have not done voluntary honor tax for Leavey Ranch. The ranch is not a property tax exempt entity because of the way it is managed, so the Foundation is paying property taxes every year. HAF+WRCF supports paying voluntary honor tax and does make annual payments on our Bayside, Eureka and Crescent City property.

Q: Can you elaborate on the funding and staffing challenges mentioned for Leavey Ranch?

A: The payout from the annual endowment has not historically been enough to maintain the diverse wishes of the donor's vision. The staffing challenge is that it has been difficult to find a long-term ranch manager with the necessary experience to fulfill all the needs of the ranch which include conservation and ecological management, tenant and lease management as well as coordinating research and community partnerships.

Q: How has the foundation invested in equity at the Leavey Ranch?

A: The foundation approaches all work through an equity lens, but staffing challenges have contributed to a lack of exploration of how this could be more fully implemented at the Leavey Ranch. Some work has been done with tribal members (see answer to question re: historically excluded populations) and we hope future stewardship of the property will expand on existing relationships and achieve a more comprehensive focus on equity.

Q: You mentioned that the current funding from the endowment has not been sufficient to fund the entirety of Jim Leavey's vision. Can you estimate what the full funding would need to be?

A: We are looking for applicants to propose a creative and sustainable business model for the Ranch. From our historical experience, we do anticipate the need for the new steward to raise additional funds. For this reason, we are looking for applicants to have the resources to raise additional funds. We do not have a specific or minimum financial target in mind, it is very dependent on the proposal and each applicant's intended use.

Q: Who is managing the ranch currently and who has managed it in the past?

A: Linda Stansberry, Project Manager, is the tenant point of contact for the property. She has been managing the operational needs of the ranch since 2020. Sarah Millsap, Vice President of Finance & Administration, has also had oversight of the operational and programmatic work at the ranch for the last 8 years.

Q: Are the current managers available to contact for additional questions?

A: For fairness and transparency in the process, we are asking that all questions be directed to the leaveyranchrfp@nrhythm.co. Tonya Price and Jeff Su from nRhythm will direct your question to the appropriate person. All questions and answers will be listed in this document.

Q: Can we reach out to the current tenants on the Ranch directly?

A: No, to protect their privacy, we are asking that no one reaches out to the tenants directly or visit the ranch. If direct contact is made or direct visitation is conducted it will disqualify you from the RFP process. Applicants selected to be part of the final round of the process will have an opportunity for a guided visit to the ranch.

Q: What will be the long-term relationship between the new steward and foundation?

A: The foundation will continue to manage the endowment and make the distributions to the new steward. The foundation will do an annual evaluation of the new steward to ensure compliance with the trust. Any further partnership will vary based on the proposal and the needs of the new steward. The foundation is committed to a smooth and successful transition of the property and will provide up to 2 years of support after the new steward is selected.

Q: What are the restrictions on the new steward's use of the Leavey Ranch?

A: The new steward will be required to comply with the terms of the trust and legally is obligated to manage the ranch in alignment with the trust. If the new steward is out of compliance with the trust, they will not receive the annual payouts from the endowment fund.

Q: How does RFP and grant fit in and align with the foundation's overall mission and focus for the region?

A: The Rubric for the RFP evaluation outlines how this grant fits in with the overall mission of the foundation. The connection points to the foundation are Community Focus, Equity, and Ecological preservation. See rubric in the application materials for more details.

Q: When will the annual payout from the Endowment be made to the new recipient?

A: Annual payouts are generally made in August. So, it will be made at this time in 2024 for the new steward.

Q: Can you give more information on the multiple funds mentioned in the trust left by Jim Leavey relationship to the endowment for Leavey Ranch

A: The other funds left by Jim Leavey to the foundation were donated with different intentions and are separate from the Leavey Ranch Endowment. There will not be any merging of these funds with the Leavey Ranch Endowment.

Q: Is there information on historical indigenous ownership of the land?

A: It is the ancestral territory of the Wiyot People, today located primarily in the three Wiyot Area Tribes: Bear River Band of the Rohnerville Rancheria, Blue Lake Rancheria, and the Wiyot Tribe. This answer is a clarification of the answer provided during the live Q&A session on August 15th when we said that the ranch was the historical home of the Wiyot people.

We have some information gathered about pre-settler use of the land that we can give to applicants as part of our supplemental information packet. More information may follow.

Q: Is there additional site information about the ranch available?

A: Yes. Additional information will be included in an additional information packet and will be provided to applicants. Additional information includes soil surveys, arial surveys, maps, other public research, and historic information on the leases and other agreements as needed for proposal development. Please keep in in mind that this information is confidential and should only be used for the purpose of developing your RFP and cannot be shared publicly. We will also include an article about the Leavey family and the region written for the *Humboldt Historian*.

Q: The Trust mentions a Leavey Ranch committee. Has this been formed and if so, what is the future of the Committee?

A: The committee was formed but has been inactive since early 2020 because of the pandemic. We are working with our attorney currently to determine if the committee needs to continue. If the committee is required, we will work with the new steward during the transition to re-form the committee and determine its future role. The committee does not have any fiduciary responsibility or oversite, it is an advisory committee only.

Q: Does the selection process include a scoring matrix or rubric?

A: Yes, the rubric is included in the RFP application.

Q: Can you explain more about the private property prohibited uses?

A: Unrestricted public use such as open visitation like a public park is not permitted. Restricted public uses such as research has been permitted.

Q: Can you clarify language in the Trust concerning the prohibition of motorized vehicles?

A: This language is open to some interpretation. Currently, motorized vehicles are being used as part of the management of the land. We are encouraging potential applicants to consult with an attorney on the interpretation of the language related to their proposal.

Q: Is the redaction on p. 17 of the trust in relation to the ranch property?

A: This redaction was made to protect the privacy of third parties. The full text of the redacted section may be disclosed to final candidates after advice from our attorney. For context, the paragraph reads like this:

"If there are not sufficient funds to support and maintain the settlor, and if the settler is unable to indicate what should be done to raise the necessary funds, the trustee shall be guided by advice from [REDACTED NAME] and [REDACTED NAME], who are authorized to permit the sale of some or all of the real property, even if such sale causes the ademption or partial ademption of gifts made hereunder.”