

# Routt County PDR Program

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## Introduction

Applications for funding through the Routt County PDR Program will be considered by the PDR Advisory Board and the Routt County Board of Commissioners in two tiers: Proposal Evaluation and Due Diligence. Tier One requires evaluation of the physical, ecological, and social aspects of the property. That review will include a site visit and utilize information provided by the Applicant and the sponsoring, qualified land conservation organization. Tier Two concerns review of the due diligence requirements and the final approval for funding.

This application package includes a brief introduction followed by the Tier One Cover Page, the Tier One Application Checklist, and the Tier Two Application Checklist. A copy of the Routt County Purchase of Development Rights Program description is also attached for background information. The PDR Program provides details of the rating system and criteria used to evaluate applications, a sample score sheet used by the PDR Board to compare funding proposals, and Routt County Commissioners Resolution No. 96-059 and Correcting Resolution No. 96-063, which enabled funding of the PDR Program.

Because the applications will be rated according to the “Routt County PDR Program Rating System,” it is recommended that you, the <sup>1</sup>Sponsoring Land Conservation Organization, and the land owner you represent carefully review the rating system to ensure all pertinent information is included in the application. Applications will be scrutinized to ensure PDR funds will not be used to advance speculative real estate transactions.

The evaluation criteria are broken down into four major categories and several subcategories. When preparing your narrative addressing the criteria, please provide the information for each category and subcategory in the order listed. For example, when describing the “Quality of Land Resource and Economic Viability” of your proposal, first describe the subcategory of the size of the ranch, then the size of the conservation easement, and so on. If any of the subcategories do not apply, please indicate so at the end of that narrative. Please be aware that your application will be evaluated on its own merits and the absence of a particular subcategory does not mean that the application will not be approved for funding.

Your application for funding must include the cover page, Application Checklist, the narratives, supporting documents, map, and letters. It is recommended that your information be presented in the order of the Application Checklist. Please review the Application checklist to ensure your application is complete; you will be notified within 7 business days of the application acceptance. An incomplete application will not be accepted by the PDR Board for review. If the application is deemed incomplete, it will be returned to you. You will be encouraged to complete your application and apply for funding at the next cycle.

Applications for funding must be submitted by the <sup>1</sup>Sponsoring Land Conservation Organization (Applicant) no later than the second Wednesday of May to the Routt County Board of County Commissioners. An electronic version (CD or email/FTP) must be submitted to [kalfieri@co.routt.co.us](mailto:kalfieri@co.routt.co.us). The PDR Board will use its best efforts to forward its recommendations to the Routt County Commissioners no later than sixty (60) days after the acceptance deadline.

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If your application is approved for funding following Tier One review, you must then provide evidence of due diligence to satisfy Tier Two. Such information includes the final appraisal, purchase agreement, conservation easement document (including mineral and water rights, as applicable), title commitment, environmental hazard survey, and closing arrangements. All information needs to be provided to the PDR Board Executive Secretary ninety (90) days prior to the proposed closing date. Closing is contingent upon meeting all Tier Two due diligence requirements. Additionally, after closing, a copy of the final recorded Conservation Easement shall be provided to the PDR Staff Assistant within 5 business days of recording

If you have questions regarding the application requirements, the scoring process, or other facets of the Routt County PDR Program, please feel free to contact any one of the members of the Citizens' Advisory Board, listed below:

Claire Sollars	(970) 757-2713	Cell	Chair
Tarn Dickerson	(970) 819-4311	Cell	Vice Chair
Mary Kay Monger	(970) 879-1663	Hm	Secretary
Dean Rossi	(970) 736-2648	Hm	
Carl Vail	(970) 879-2591	Wk	Treasurer
Mary Alice Page-Allen	(970) 846-4582	Cell	
Kendra Alfieri	(970) 870-5315	Wk	Executive Secretary
	(970) 879-3992	Fax	

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<sup>1</sup> Sponsoring Land Conservation Organization – an organization as defined by the Internal Revenue Service (IRS)

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## TIER ONE

Application for Funding

### Cover Page

#### Property Owner (s):

Name:	
Address:	
Email:	Telephone:

Name:	
Address:	
Email:	Telephone:

#### Applicant - Qualified Sponsoring Land Conservation Organization:

Organization Name:	
Address:	
Email:	Telephone:
Contact Name:	

#### Funding Information:

What is the preliminary estimated value of the conservation easement's development rights and basis for this estimate?

Value: \$	Basis for estimate:
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What is the amount of funding you are requesting towards the purchase of the conservation easement?

\$
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Are you requesting transaction costs, and if so, how much are you requesting?

\$
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Please provide detailed estimate of transaction costs:

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Total amount of funding being requested:	\$
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If leveraging is available or has been applied for, what is the funding source(s) and amount(s)?

Source:	Amount: \$
Source:	Amount: \$
Comments:	

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## TIER ONE Application for Funding

### Application Checklist

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#### General Information:

	For office use only
<input type="checkbox"/> Did you fill out the cover page and supplied names, all contact information of the <b>applicant – Sponsoring Land Conservation Organization</b> ?	<input type="checkbox"/>
<input type="checkbox"/> Did you supply the names and all contact information of all the <b>property owners</b> ?	<input type="checkbox"/>
<input type="checkbox"/> Did you provide all the information concerning the <b>funding</b> request, and the information regarding leveraging?	<input type="checkbox"/>
<input type="checkbox"/> Did you provide information regarding any proposed <b>reservations</b> , including a description of the type of structures (primary home, secondary unit, , etc.) and the proposed locations (preferred and alternate) of those structures?	<input type="checkbox"/>

#### Narratives:

1. Did you provide a narrative regarding <b>Leverage</b> ? The PDR Board will seek to maximize the use of its limited funds by leveraging other resources for each PDR application. To evaluate leveraging, the PDR Board will be looking for information concerning:	
1a. <u>Landowner Donation</u> – what proportion of the value of the development rights is the Landowner willing to donate?	
1b. Landowner Transaction Costs – what proportion of the transaction costs will the landowner anticipate paying?	
1c. <u>Application Partners</u> – what proportion of the total price of the conservation easement and the transaction costs will be covered by others, such as local government, GOCO, non-profit land conservation organizations, and state and federal agencies?	
1d. <u>Previous or concurrent donation of Conservation Easement</u> – have you previously donated or are you currently concurrently donating a conservation easement, in whole or in part, which enhances the purpose of your application?	

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## TIER ONE

### Application for Funding

	<p>2. Did you provide a narrative regarding the <b><i>Quality of Land Resource and Economic Viability?</i></b> The purpose of this category is to determine the quality of the conservation easement for agricultural production and its potential to stay in agriculture and operate as an economic unit.</p>	
	<p>2a. <u>Size of Conservation Easement</u> – what is the total acreage and percentage of the deeded land to be restricted by the conservation easement?</p>	
	<p>2b. <u>Soils of Statewide Importance</u> – what percentage of the soils in the conservation easement are of statewide significance?</p>	
	<p>2c. <u>Amount of Irrigated Land</u> – what amount of acreage in the proposed conservation easement is irrigated hayland or sub-irrigated pasture? Please describe what adjudicated water rights are used to irrigate the proposed conservation easement area.</p>	
	<p>2d. <u>Average Annual Number of Animal Units Maintained</u> – what average number of animal units have been carried on the proposed conservation easement during the annual grazing season over the past 5 years?</p>	
	<p>2e. <u>Average Hayland or Crop Production</u> – what is the annual average ton per acre of hay produced or the average bushels per acre of grain production on the proposed conservation easement over the past 5 years?</p>	
	<p>3. Did you provide a narrative regarding <b><i>Multiple Community Values?</i></b> The PDR Board will be looking at applications to determine whether the property possesses multiple values, which the community considers important to protect, such as natural areas, wildlife habitat, or historic values.</p>	
	<p>3a. <u>Significant Natural Area</u> – does the property contain plant communities, habitat types, or species considered significant by the Colorado Natural Heritage Program, the Colorado Division of Wildlife, or the Colorado Natural Areas Program?</p>	
	<p>3b. <u>Scenic Values</u> – is the proposed conservation easement visible from a federal or state highway, or primary county road, or rural county road, or is it considered to be within or near an area identified as having scenic value?</p>	
	<p>3c. <u>Historic Values</u> – are there features located on the proposed conservation easement that are of historical importance?</p>	
	<p>3d. <u>Public Policy</u> – is the proposed property to be restricted by the conservation easement located in an area that is compatible with objectives of adopted or proposed public plans and if so, what are those objectives?</p>	

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	<p>4. Did you provide a narrative regarding <b><i>Circumstances Affecting Continued Agricultural Operation and/or Maintenance of Natural Values and Function?</i></b> The PDR Board will be reviewing your application to determine if it is located adjacent to working ranches or significant natural areas, and to assess whether the likelihood of continued agricultural activity or protection of the natural area is high.</p>	
	<p>4a. <u>Size of Ranch</u> – what is the total acreage of the ranch, including deeded land, leased land, or permitted public land and what is the acreage of each category?</p>	
	<p>4b. <u>Proximity to Other Operating Ranches or Properties with Significant Natural Areas</u> – is your property close to other ranches or significant natural areas and if so, how close (in miles)?</p>	
	<p>4c. <u>Proximity to Other Ranches or Natural Area Properties Protected by Conservation Easements or to Public Lands</u> – is the proposed conservation easement close to other ranches or significant natural areas that are either protected by conservation easements or located near public lands?</p>	
	<p>4d. <u>Human Resources</u> – is your ranch operated by family members and/or does it provide an opportunity for a new or existing rancher to create or expand an operation to make it more viable?</p>	
	<p>4e. <u>Continuation of Ranching Heritage: Length of Operation of Ranch by Same Family</u> – how long has the same family been operating the ranch?</p>	

## Property Information:

	<p>Did you include a deed or other document that provides <b><i>proof of current ownership</i></b> of the proposed conservation easement?</p>	
	<p>Did you provide the property record card from the Routt County Assessor’s Office for the conservation easement area?</p>	
	<p>Did you provide a <b><i>Legal Description</i></b> of the property, which is the subject of the Application for funding? The legal description should include the proposed conservation easement and all the surrounding land that is part of the operating ranch or significant natural area.</p>	
	<p>Did you provide a <b><i>Title Commitment</i></b> that covers the property?</p>	
	<p>Did you provide a deed, tabulation or other documentation that provides indicia of current ownership of <b><i>water rights</i></b> associated with the conservation easement, and a statement describing which water rights will be dedicated to the easement?</p>	

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<input type="checkbox"/>	Did you provide a deed, tabulation or other documentation that provides indicia of the landowner's current ownership of <i>mineral rights</i> associated with the conservation easement?	<input type="checkbox"/>
<input type="checkbox"/>	Did you provide a narrative regarding <i>hazardous materials</i> (as described by the federal government) that may or may not be located, used, or disposed of on the property?	<input type="checkbox"/>
<input type="checkbox"/>	Did you provide <i>Maps or Other Documents</i> (i.e. aerial photograph, quadrangle, plat map) showing the property and other information? Please be sure that your name is at the bottom of the document and the map is of adequate size to clearly show the following required information that applies to your application:	<input type="checkbox"/>
<input type="checkbox"/>	a. Surrounding property within one mile radius of application boundaries	<input type="checkbox"/>
<input type="checkbox"/>	b. Other conservation easements in applicant's or adjacent properties	<input type="checkbox"/>
<input type="checkbox"/>	c. Areas of irrigated land	<input type="checkbox"/>
<input type="checkbox"/>	d. Areas of small grain farming	<input type="checkbox"/>
<input type="checkbox"/>	e. Areas of proposed conservation easement	<input type="checkbox"/>
<input type="checkbox"/>	f. Locations of improvements (i.e. barns, outbuildings, houses, fences, irrigation head gates, ponds, etc.)	<input type="checkbox"/>
<input type="checkbox"/>	g. Areas of deeded land, leased land, or permitted land (including identity of lessor or permitting party)	<input type="checkbox"/>
<input type="checkbox"/>	h. Natural areas	<input type="checkbox"/>
<input type="checkbox"/>	i. Locations of historical features	<input type="checkbox"/>
<input type="checkbox"/>	j. Federal or state highways, or primary or rural county roads	<input type="checkbox"/>
<input type="checkbox"/>	k. Locations of proposed reservations	<input type="checkbox"/>



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## Supporting Letters:

<input type="checkbox"/>	Did you provide a <b><i>Preliminary Estimate of Value Letter or a preliminary appraisal?</i></b> These values must be based on the sponsor's knowledge of the local land values and an explanation of how the values were reached needs to be provided along with the Tier I documents.	<input type="checkbox"/>
<input type="checkbox"/>	Did you provide a <b><i>Letter of Recommendation from Sponsoring Land Conservation Organization,</i></b> which discusses why the application should be approved?	<input type="checkbox"/>
<input type="checkbox"/>	Does your application include a <b><i>Letter from the Applicant</i></b> describing why the proposal should be approved for funding? This is a chance to describe the uniqueness of the application and why it should be chosen above the others. It is also a good opportunity to demonstrate how the application meets Resolution 96-059 and the goals identified in the Routt County PDR Program (included in the application package).	<input type="checkbox"/>

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## TIER TWO Application for Funding

### Application Checklist

The following information should be provided *only if* your application is approved for funding after Tier One review. All Tier Two documents must be submitted at **least 90 days prior to closing**. All submitted documents need to be *final documents* and submitted all together for Board's review.

For office  
use only

<input type="checkbox"/> Did you provide the <i>Final Appraisal</i> ?	<input type="checkbox"/>
<input type="checkbox"/> Did you provide the <i>Purchase Agreement</i> ?	<input type="checkbox"/>
<input type="checkbox"/> Did you provide the <i>Conservation Easement Document</i> , including the provisions relating to <i>mineral rights</i> and/or <i>water rights</i> , as applicable?	<input type="checkbox"/>
<input type="checkbox"/> Did you provide the <i>Baseline Report</i> ?	<input type="checkbox"/>
<input type="checkbox"/> Did you provide the <i>Title Commitment</i> for the subject property?	<input type="checkbox"/>
<input type="checkbox"/> Did you provide an <i>Environmental Hazard Survey</i> concerning hazardous materials (as described by the federal government) that may or may not be located, used, or disposed of on the property?	<input type="checkbox"/>
<input type="checkbox"/> Did you provide a narrative detailing the <i>Closing Arrangements</i> (including where the closing is to occur, the cost of the closing, wiring instructions, etc.)?	<input type="checkbox"/>
<input type="checkbox"/> Did you provide a <i>Proposed Press Release</i> ?	<input type="checkbox"/>
<input type="checkbox"/> Did you provide a signed original of the <i>Agreement Concerning Conservation Easement prior to final Tier II funding approval meeting</i> ?	<input type="checkbox"/>

After closing, please provide a copy of the recorded deed.

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## Transaction Cost Reimbursement

After invoices are received, reviewed and approved, transaction costs will be reimbursed either at closing or after the project closes. The reimbursement will be made to the Sponsoring Conservation Land Trust organization. *In order for reimbursement to be included at closing, all documentation needs to be received no later than 7 days prior to the Tier II funding approval meeting.*

The reimbursement will be made according to Resolution 96-059, Section 8: Related transaction costs –The holder of a Conservation Easement purchased in whole or in part with expenditures from the Fund may be reimbursed from the Fund for the costs of appraisals, surveying, legal and other services such as easement documentation, baseline documentation and environmental reports, incurred incident to the acquisition of approved Conservation Easements up to a maximum of twenty-five dollars (\$25,000.00). Costs in excess of this limitation may be reimbursed with the prior approval of the Citizens Advisory Board and the Board (BCC). This request may be made prior to the formal submittal of the application to the Citizens Advisory Board. The County shall not be responsible for expenses incurred by the Owner incident to the purchase of the Conservation Easement. The maximum amount may be adjusted according to the provisions of the Annual Review as described in Section 9 of this Resolution.

Other transaction cost may be considered on a case by case basis.