

**Application for Funding
Gallatin County Open Space Grant Program
Public Parks, Recreation, Environmental Education and Trails**

Introduction

Proposals for funding through the Gallatin County Open Space Grant Program will be considered by the Open Lands Board (OLB) and the Gallatin County Board of Commissioners in two steps: Level One: Proposal Evaluation and Level Two: Due Diligence. Level One reviews the substantive issues in the proposal including the park, recreation, environmental education and trails potential, site characteristics, management capacity and community aspects of the property. This review will include a site visit and utilize information provided by the Applicant parties, consisting of the sponsoring governmental entity or organization and the governmental entity that will hold title to the land, if not the sponsoring governmental entity. Together these parties shall be referred to as the Applicant. Level Two review occurs if the Level One Application is approved by the OLB and County Commissioners and relates to due diligence issues and the transaction documents.

NO APPLICATION SHALL BE ACCEPTED WHERE THE CONTEMPLATED TRANSACTION WAS COMPLETED OR CLOSED BEFORE NOVEMBER 7, 2000.

All applications should be submitted as a proposal from the Applicant. This application package contains the following items to be submitted by the Applicant entities:

1. Level One Summary Page
2. Level One Application Checklist, Narratives and Letters of Support
3. Level One Property Description, including proof of current ownership, legal description, title commitment, and maps.
4. Level Two Application Checklist and Due Diligence Items to be Provided

The Level One Application Checklist includes the criteria used by the Open Lands Board to evaluate applications and compare funding proposals. It is recommended that Applicants carefully review these criteria and the rating chart at the end of this packet to ensure that all information is included in the application. Applicants are encouraged to work with a qualified, non-profit land trust in both negotiating transactions and putting forth applications. Proposals will be reviewed to ensure that County funds will not be used to advance speculative real estate transactions.

While all of the information submitted will be utilized to evaluate an application, the Open Lands Board will utilize four main criteria to compare and rate applications (items 2 to 5 in the Application Checklist). When preparing your narrative addressing the criteria, please provide the information for each category and subcategory in the order listed. If any of the subcategories do not apply, please indicate so in the narrative. Please be aware that your proposal will be evaluated on its own merits and the absence of a

Public Parks, Recreation and Trails Application Packet Adopted 6/4/02 by the County Commission

particular subcategory does not mean that the project will not be approved for funding. Incomplete applications will not be reviewed and will be returned. If your application is returned, you will be encouraged to apply for funding in the next cycle.

Beginning in May, 2002, applications for funding are accepted twice a year and must be submitted no later than 4 pm on May 15 or November 15 to the Gallatin County Board of County Commissioners, address, in an envelope marked "Parks, Recreation, Trails and Environmental Education Project Application."

Gallatin County Board of County Commissioners
311 W. Main, Rm. 300
Bozeman, MT 59715

These dates are firm except for the first cycle, which shall remain open until June 21, 2002 due to the change in procedures. Applicants are advised that all materials submitted in the application become part of the public record. The Open Lands Board will forward its recommendations to the Gallatin County Commissioners no later than thirty (30) days after the acceptance deadline.

If your proposal is approved for funding following the Level One review, you must then provide evidence of due diligence and final transaction documents to satisfy Level Two. Such information should be submitted according to any conditions identified in the Commissioner's approval of the Level One Application. If you fail to meet the Level Two requirements, funds will not be disbursed. However you may submit the same proposal for funding consideration in a future proposal cycle.

Parks, Recreation, Trails and Environmental Education Project Review Process

The following is a summary of the steps in the review process:

Level One

Step 1: Pre-Application meeting with Open Lands Board Coordinator to review application requirements and process and answer questions.

Step 2: Level One application is submitted by Applicant. Application includes response to all application questions, application checklist, proposed easement terms, property information and map, supporting letters and preliminary appraisal. Incomplete applications are returned.

Step 3: Open Lands Board evaluates and reviews the application according to the Gallatin County Parks, Recreation, Trails and Environmental Education Program Criteria and the information supplied by the Applicant parties. Review will include a site visit and utilize information submitted by the Applicant parties.

Step 4: Any County agency that has oversight, including the Planning Board and County legal counsel, shall review the application and provide the Open Lands Board with comments.

Step 5: Open Lands Board meets with the applicant at a scheduled meeting. Issues from the review are raised and discussed. If the application and terms are agreeable to the Board and Applicant, the Open Lands Board passes a motion to recommend approval to the County Commissioners. If the quality of the proposal, type of property, terms or conditions are unacceptable, the application is denied. If there are outstanding issues, action on approval is put off until issues are resolved and taken up at a later Open Lands Board meeting.

Step 6: County Commissioner Action. The recommended Level One application is submitted to the County Commissioners and reviewed. The Commissioners will take up the recommendation at a business meeting and hearing that has been noticed. The Applicant parties, Open Lands Board and any concerned member of the public shall be permitted to present information on the application. At the end of consideration, the Commissioners shall take action to approve the Level One application, to approve with conditions or to reject the application.

Level Two

Step 7: Applicant submits a Level Two application that includes due diligence items including: final appraisal, purchase agreement, conservation easement document, title commitment, environmental hazard survey and closing arrangements. Incomplete applications will not be accepted.

Step 8: The Open Lands Board and County legal counsel shall review and comment on the Level Two application documents. When these have been finalized and if they conform to the Commissioner's Level One approval, the application shall be forwarded to the Commissioner's for final approval. Step 9: County Commissioner Action. The County Commissioners shall grant final approval for funding at a regular business meeting as long as all conditions and due diligence requirements have been met. Step 10: Project closing takes place and County disburses funds.

If you have questions regarding the application requirements, the scoring process or other aspects of the Gallatin County Open Space Program, please contact the Open Lands Board Coordinator: Coordinator name, phone, address

**Level One -Application for Funding
Gallatin County Open Space Grant Program
Public Parks, Recreation, Trails and Environmental Education
Summary Page**

Applicants: Public Entity and/or Sponsoring Organization

Name: _____ Telephone No.: _____

Address:

Name: _____ Telephone No.: _____

Address:

Public Entity Taking Title to Land or if Conservation Easement, Entity Holding Easement

Name: _____ Contact: _____

Telephone No.: _____

Property Owners

Name: _____ Telephone No.: _____

Address:

Name: _____ Telephone No.: _____

Address:

Funding Information

What is the appraised value of the land or conservation easement? _____

What is the amount of funding you are requesting? _____ Are you requesting transaction costs, and if so, how much are you requesting? _____.

If leveraging is available or has been applied for, what is the source(s) and amount(s)?

Source: _____ Amount: _____

Source: _____ Amount: _____

Source: _____ Amount: _____

**Level One- Application for Funding
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Public Parks, Recreation, Environmental Education and Trails Projects**

Application Checklist

The following checklist is designed to aid you in putting together your application and in making sure that it is complete. Please make sure that you have provided the information requested in this application packet for all 10 items in this checklist.

Narratives

For items 1 through 6 provide a succinct narrative description of the information requested. While all of the information will be used to assess the merits of an application, items 2 through 5 relate to specific criteria that will be utilized by the Open Lands Board to compare and rate applications. The scoring sheet for these items is included at the end of the packet.

1. **General Description.** Provide a narrative description that addresses each of the subcategories in the order presented.

- 1a. Size of Property – what is the total acreage of the property, or if a trail, the acreage of the property on which the trail is located?
 - 1b. Size of Area to be Purchased- what is the area to be purchased if it is less than the total acreage of the Property? If the area is a trail, indicate the length and width of the trail to be acquired in fee or conservation easement? If the area to be purchased is less than the size of the Property, indicate likely and permitted uses on the remainder of the property.
 - 1c. Zoning and Current Land Use- what is the zoning category and current land uses that are being practiced on the Property and on properties immediately surrounding the Property (i.e. agriculture, forestry, single family, etc.)?
 - 1d. Public Park, Recreation, Environmental Education and Trails Activities and Programs – what are the public parks, recreational and environmental education activities or types of trails that are proposed for the Property? What is the cost of these facilities and how are they to be paid for?
 - 1e. Property Management and Maintenance – what is the public entity that will have responsibility for maintenance, land management, liability coverage, patrol and security, utility costs and other activities associated with the park, recreational, environmental education and trail uses of the property and what history do they have of managing public uses such as those proposed or working with nonprofit or private entities to perform these functions.
2. Provide a narrative describing the **Park, Recreational, Trail and/or Environmental Education Benefits** of the proposed project. The purpose of this category is to determine whether the proposed uses of the property have broad public support, address publicly identified park, recreation, environmental education or trail needs and that the site is well suited to provide these benefits.
 - 2a. Broad Public Support for Project – has the project been endorsed through a process of public review, input and support?
 - 2b. Address Regional or Community-Wide Need – does the project address park, recreational, trails or environmental education needs as determined by a needs assessment?
 - 2c. Appropriate Location – has the Applicant systematically reviewed alternative locations for the proposed use and determined that this site provides the best location for the proposed public uses, does not have limitations for the public uses proposed and is compatible with adjacent land uses?
 3. Provide a narrative describing the **Plans and Capacity of the Public Management Agency** to provide appropriate management of the facilities and land. The purpose of

this category is to determine if adequate provision has been made for the management of the land and facilities so that they will provide quality service, recreational opportunities and protection of the environment on a sustainable basis at reasonable cost to the public.

- 3a. Capacity to Manage Park, Recreational, Environmental Education and Trail Lands – does the public entity acquiring the park, recreation, environmental education and trail lands or conservation easements have the capacity to appropriately manage the lands and facilities over time? Identify plans, funding sources, contingencies and other evidence of such capacity.
- 3b. Impact of Improvement Costs on Public – what are the projected construction, facility and other improvement costs, how will these be met and what impact will these costs have on the public?
- 3c. Impact of Maintenance Costs on Public - what are the projected annual maintenance, land management, liability, patrol and security, utility and costs of other activities associated with the park, recreational, environmental education and trail uses of the property and what impact will these have on the public?
- 3d. Impact on Community Services and Facilities – will the site and facilities require substantial public investment to accommodate the proposed uses and is the site located in proximity to required urban services such as water, power, roads and sewer?
4. Provide a narrative describing **Multiple Community Values**. The purpose of this category is to determine whether the property has significant natural, scenic and public policy values important to the community.
 - 4a. Significant Habitat Diversity – does the property contain significant wildlife and plant habitat types and diversity as defined and identified by MFWP as the interspersions of the following vegetation communities: shrub/grassland, riparian, broadleaf forest, conifer forest and agricultural lands?
 - 4b. Significant Water Resource, Fishery or Recharge Area – does the property contain a perennial river, stream, water bodies or wetlands that constitute a significant water resource, fishery (according to MFWP criteria) or aquifer recharge area?
 - 4c. Scenic Values – is the property visible from a federal or state highway, primary county road, or minor county road, and is it considered to be within or near a publicly identified area as having scenic value?
 - 4d. Public Policy – is the property located in an area where the proposed use is encouraged by an adopted land use plan or regulation? How is the proposed use

consistent with the intent, goals and policies of any applicable land use plans or regulations (please identify)?

5. Please provide a narrative regarding **Leverage**. The Gallatin County Open Lands Board seeks to maximize the use of its limited funds by leveraging other financial resources or additional protected property for each project. To evaluate leverage, the Open Lands Board looks at information you provide concerning:
 - 5a. Landowner's Contribution and/or Favorable Purchase Terms – how much of the value of the property or easement acquisition is the Landowner willing to contribute and/or how much is the landowner willing to offer in financing and terms below generally accepted market norms (i.e. favorable installment purchase, reduced interest, etc.)?
 - 5b. Proposal Partners – what proportion of the total price of the land or conservation easement will be contributed by a combination of partners including local government, state and federal governments, charitable foundations and non-profit land conservation organizations?
 - 5c. Matching Land or Conservation Easement Donations – are there other lands or conservation easements on adjoining or nearby lands being donated with your proposal that would enhance the purpose of your application?
6. Please provide a narrative regarding **Hazardous Materials** (as described by the federal government) that may or may not be located used, or disposed of on the property.

Supporting Letters, Information and Maps

7. Property Information requested on the accompanying **Property Information Form** including proof of current ownership, legal description, title and maps and supporting documentation provided.
8. Please provide a **Preliminary Appraisal** letter from a qualified appraiser. It is recommended that your preliminary appraisal letter be no more than one year old. A list of appraisal qualifications is on file in the Coordinator's office (address).
9. Please include a **Letter from the Applicant** parties describing why the proposal should be approved for funding. This is your chance to describe the importance of your proposal, how it meets the intent of the Gallatin County Open Space program and why it should be chosen above others.

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Property Information

Your application must include the following property information:

1. Proof of Current Ownership. Please include a deed or other document that provides proof of current ownership of the property proposed for acquisition or protection.
2. Legal Description. Please provide the legal description for the property proposed for acquisition or for conservation easement. The legal description should include the proposed acquisition and easement areas and any adjacent land that is owned by any of the owners.
3. Title Commitment. Please provide a title commitment, completed within the past year that identifies encumbrances and restrictions that may affect the use of the property.
4. Map and Supporting Documentation. Please provide a map (aerial photo, USGS quadrangle, County GIS, Plat) of sufficient size to clearly show the following types of information relating to the property proposed for acquisition or conservation easement.
 - a. Property Boundary of property identified in legal description.
 - b. Surrounding property within a one-mile radius of property boundary.
 - c. Area of proposed property acquisition or conservation easement.
 - d. Locations of environmental hazards such as steep slopes (over 25%), flood plain and flood channel, geologically unstable areas, dumps, contaminated areas or old mines and other features that might present a hazard to public use.
 - e. Locations of improvements showing houses, barns, outbuildings, fences, irrigation ditches and any other substantial structures.
 - f. Areas of irrigated land and cultivated cropland.
 - g. Rivers, streams, creeks, wetlands, natural areas and wildlife habitat.

- h. Public trails, proposed trails and public access to public lands or rivers on Owners's land or on adjacent properties.
- i. Locations of proposed public park's, recreational and/or environmental education facilities.
- j. Locations of historic features.
- k. Federal or state highways, primary or rural county roads providing access to the Property.

**Level Two- Application for Funding
Gallatin County Open Space Grant Program
Public Parks, Recreation, Trails and Environmental Education**

Application Checklist

The following seven items relate to due diligence and the transaction documents to complete the project. These should be provided if your application is approved for funding after Level One review. These items must be prepared according to any conditions attached to the Commissioner's approval of the Level One Application.

1. The Purchase Agreement for the property or conservation easement. If purchasing a conservation easement, provide a copy of the conservation easement and baseline documentation report.
2. A Title Commitment for the subject property and resolution of any title issues.
3. The Final Appraisal.
4. An agreement limiting future development on the purchased property or a conservation easement to be executed with a qualified land conservation organization.
5. An Environmental Hazard Survey concerning hazardous materials (as described by the federal government) that may or may not be located, used or disposed of on the property.
6. A Mineral Remoteness letter, if the minerals under the property are owned by third parties, prepared by a qualified geologist in order to ensure that mining is unlikely to take place on the property in the future.
7. A narrative describing the Closing Arrangements –where the closing is to occur, closing participants, settlement sheets, escrow arrangements if required, the cost of closing, etc.

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