July 1, 2009

### **APPLICATION GUIDE**

For

Conservation Easements Pursuant to Public Resources Code Division 5, Chapter 1, § 5011.7



# State of California Department of Parks and Recreation Office of Grants and Local Services (OGALS)

"Creating Community through People, Parks, and Programs"

#### **Send Applications and Correspondence to:**

**Street Address for Overnight Mail:** 

**Mailing Address:** 

Calif. Dept. of Parks and Recreation Office of Grants and Local Services 1416 Ninth Street, Room 918 Sacramento, CA 95814 Calif. Dept. of Parks and Recreation Office of Grants and Local Services P.O. Box 942896 Sacramento, CA 94296-0001

Phone: (916) 653-7423 www.parks.ca.gov/grants



#### **Department Mission**

The mission of the California Department of Parks and Recreation (DPR) is to provide for the health, inspiration, and education of the people of California by helping to preserve the state's extraordinary biological diversity, protecting its most valued natural and cultural resources, and creating opportunities for high-quality outdoor recreation.

#### The Office of Grants and Local Services (OGALS) Mission Statement

The mission of the Office of Grants and Local Services is to address California's diverse recreational, cultural and historical resource needs by developing grant programs, administering funds, offering technical assistance, building partnerships and providing leadership through quality customer service.

#### **OGALS Vision Goals**

- Proactive in meeting California's park and recreation needs through innovative grant programs and customer service.
- Committed to providing quality customer service in every interaction and transaction as honest, knowledgeable, and experienced grant administrators.
- Sensitive to local concerns while mindful of prevailing laws, rules and regulations.
- Responsive to the needs of applicants, grantees, nonprofit organizations, local governments, and legislative members, who are our partners working to improve the quality of life for all Californians by creating new parks and recreation opportunities.

#### APPLICATION GUIDE For Conservation Easement Grants

#### **TABLE OF CONTENTS**

| APPLICATION PROCESS  | 3  |
|--|----|
| PHASE I APPLICATION PACKET   | 4  |
| Phase I Application Packet Checklist   | 4  |
|  |    |
|  |    |
| Authorizing Resolution   | 7  |
| Proposal   | 9  |
| APPLICATION PROCESS         3           PHASE I APPLICATION PACKET         4           Phase I Application Packet Checklist         4           Application Form         5           Non-Profit Land Trust Organization Requirements         6           Authorizing Resolution         7           Proposal         9           PHASE II APPLICATION PACKET         10           Phase II Application Packet Checklist         10           GRANT SCOPE/Cost Estimate Form         11           Baseline Conditions Report, Attachments, and Checklist Form         13           California Environmental Quality Act (CEQA) Compliance         14           Copy of the Conservation Easement and Letters of Intent         16           Conservation Easement Requirements Checklist Form         17           ELIGIBLE COSTS CHART         19           DEFINITIONS         20 |    |
| Phase II Application Packet Checklist  | 10 |
|  |    |
| Baseline Conditions Report, Attachments, and Checklist Form  | 13 |
| California Environmental Quality Act (CEQA) Compliance   | 14 |
| Copy of the Conservation Easement and Letters of Intent  | 16 |
| Conservation Easement Requirements Checklist Form  | 17 |
| ELIGIBLE COSTS CHART   | 19 |
| DEFINITIONS  | 20 |

## OGALS Welcomes You to the Application Guide for Conservation Easement Grants

- Use this guide for the APPLICATION process.
- ❖ We also strongly recommend that you review the GRANT ADMINISTRATION GUIDE before sending your APPLICATION to OGALS. We hope you will find both guides user-friendly.
- ❖ Please call, write, or email OGALS with any questions or comments. Contact information for OGALS is given on the inside of the front cover of this guide.
- Website: www.parks.ca.gov/grants.

NOTE: The meanings of words and terms shown in SMALL CAPS are in the Definitions Section at the back of this guide.

1 Introduction

# APPLICATION GUIDE FOR CONSERVATION EASEMENT GRANTS

This Application Guide provides APPLICATION PACKET requirements for CONSERVATION EASEMENT GRANTS pursuant to Public Resources Code Division 5, Chapter 1, § 5011.7.

Public Resources Code Division 5, Chapter 1 § 5011.7 (d) (1) authorizes DPR to "make grants to a state or local government agency or a nonprofit land trust organization to purchase and hold a conservation easement, using funds appropriated to the department through the annual Budget Act that have been authorized for encumbrance for either capital outlay or local assistance."

The CONSERVATION EASEMENT GRANTS may be made through a competitive process, or as specified by the Legislature. The application process and requirements set forth in this Application Guide is applicable to either competitive or specified grants.

The policies in this APPLICATION GUIDE and the GRANT ADMINISTRATION GUIDE adopted by DPR are subject to further revision pursuant to the Administrative Procedures Act – California Government Code §11340 et seq.

#### **Amount of Funds Available**

At the time of this Application Guide's publication, the Budget Act or the Legislature has not made funds available for CONSERVATION EASEMENT GRANTS pursuant to Public Resources Code Division 5, Chapter 1, § 5011.7

#### **APPLICATION PROCESS**

- 1. Review this guide to understand the Phase I and Phase II APPLICATION PACKET requirements.
  - The purpose of having two phases is to reduce costs for APPLICANTS should proposals not qualify for Phase II consideration.
  - See steps 5 and 6 below for more information.
- 2. Review the GRANT ADMINISTRATION GUIDE to understand DPR'S GRANT administration requirements. The GRANT ADMINISTRATION GUIDE also includes a sample CONTRACT and its provisions.
- 3. Send the Phase I APPLICATION PACKET to OGALS postmarked by the APPLICATION deadline. (The deadline is not yet determined.) See the checklist on page 4 for directions and forms.
- 4. OGALS will perform a preliminary review of the Phase I APPLICATION PACKET for technical completeness and then forward it to DART.
- 5. DART will review the merit of the proposed CONSERVATION EASEMENT. DART may request additional information or conduct a site visit.
- 6. The Chair of DART will inform OGALS whether the Phase I APPLICATION PACKET is accepted or rejected by DART. OGALS will send a letter to APPLICANTS indicating the outcome of DART's review. If the Phase I APPLICATION PACKET is accepted by DART, the letter will request the Phase II APPLICATION PACKET.
- 7. Send the Phase II APPLICATION PACKET to OGALS. See page 10 for directions and forms.
- 8. DART will review the Phase II APPLICATION PACKET to determine if the GRANT should be awarded.
  - Submitting a Phase II APPLICATION PACKET does not guarantee a GRANT award.
- 9. APPLICANTS with a successful Phase II APPLICATION will receive a GRANT award letter from OGALS.
  - APPLICANTS must attend a GRANT administration technical assistance workshop before OGALS will send a CONTRACT.
- 10. APPLICANTS become GRANTEES when their CONTRACTS are signed by their AUTHORIZED REPRESENTATIVE and DPR.
- 11. GRANTEES start using the GRANT ADMINISTRATION GUIDE.

#### PHASE I APPLICATION PACKET

Instructions for submittal of the Phase I APPLICATION PACKET

- Send one original unbound Phase I APPLICATION PACKET for each CONSERVATION EASEMENT.
- Submit APPLICATION PACKET items in the order shown in the Checklist below.
- If a Checklist item does not apply, note "N/A" and provide a brief explanation.
- Send only the items shown in the Checklist. Do not send supplementary materials, such as power point presentations, videos, or letters of support.
- Descriptions and forms for each Checklist item can be found on the following pages:

#### **Phase I Application Packet Checklist**

| 1. 🗌 | Application FormP                               | age | 5 |
|------|---|-----|---|
| 2. 🗌 | Nonprofit Land Trust Organization RequirementsP | age | 6 |
| 3. 🗌 | Authorizing Resolution P                        | age | 7 |
| 4. 🗌 | Maps P  | age | 9 |
| 5. 🗌 | ProposalP                                       | age | 9 |

**Application Form** 

# STATE OF CALIFORNIA – THE RESOURCES AGENCY DEPARTMENT OF PARKS AND RECREATION APPLICATION FOR A CONSERVATION EASEMENT GRAN

|  | FOR A CONSERVATION  | ON EASEMENT GRAN  | Т               |
|--|---|---|-----------------|
| PROJECT NAME   |   |   |                 |
| PROJECT PHYSICAL ADDRE                                 | SS (including zip code)   |   |                 |
|  |   | Requested GRANT Amount<br>Other Funding Sources<br>Total                | \$<br>\$<br>\$  |
| Nearest Cross Street                                   | County of Project Location  |   |                 |
| GRANT APPLICANT (entity ap                             | plying for the grant)   | Check Type of Agency: ☐ City ☐ County ☐ DIS* ☐ Other (explain on separa |                 |
| GRANT APPLICANT'S Mailing Address                      |   | Check Type of Project:  ☐ ACQUISTION                                    |                 |
| AUTHORIZED REPRESENTA                                  | TIVE AS SHOWN IN RESOLUT  | TION OR CERTIFICATION LET   | TER             |
| Name (typed or printed) and Title Email address Phone  |   |   |                 |
| DIRECTOR/PRESIDENT/CEO                                 |   |   |                 |
| Name (typed or printed) an                             | d Title   | Email address   | Phone           |
| DAY-TO-DAY CONTACT for A                               | DMINISTRATION of the GRAN   | T (if different from AUTHORIZED I                                       | REPRESENTATIVE) |
| Name (typed or printed) an                             | d Title   | Email address   | Phone           |
| For ACQUISITION:                                       |   |   |                 |
| Total land acquired through acres                      | easement will be  |   |                 |
| requested GRANT to complete Form. I declare under pena | t and warrant that this APPLIC<br>te the CONSERVATION EASEME<br>lity of perjury, under the laws<br>including required attachmer | ENT listed in the attached GRA<br>s of the State of California, the     |                 |
| Signature AUTHORIZED REP                               | RESENTATIVE as shown in Re  | esolution   | Date            |
| Print Name   |   |   |                 |
| Title  |   |   |                 |
|  |   |   |                 |

#### **Non-Profit Land Trust Organization Requirements**

NON-PROFIT LAND TRUST ORGANIZATIONS must provide the following:

- Verification of 501(C)(3) status
- Articles of incorporation
- Mission statement
- Copy of the most recent IRS Form 990

#### **Authorizing Resolution**

Authorizing resolutions are required for all of the following applicants:

- Cities
- Counties
- DISTRICTS
- NON-PROFIT LAND TRUST ORGANIZATIONS

The Resolution template on the following page may be reformatted. However, the language provided in the Resolution template must be included in the reformatted document. Please be aware that any additional changes to the language may delay APPLICATION approval if the changes require DPR's legal office review or subsequent revisions.

| Resolution No:   |  |  |  |
|--|--|--|--|
| RESOLUTION OF THE ( <u>Title of Governing Body/City Council, Board of Supervisors/Directors</u> ) OF ( <u>City, County, District, or Non-Profit Land Trust Organization</u> )  APPROVING THE APPLICATION FOR A CONSERVATION EASEMENT GRANT                                   |  |  |  |
| WHEREAS, the State Department of Parks and Recreation has been delegated the responsibility by the Legislature of the State of California for the administration of the Conservation Easement Grant Program, setting up necessary procedures governing the Application; and  |  |  |  |
| WHEREAS, said procedures established by the State Department of Parks and Recreation require the applicant to certify by resolution the approval of application(s) before submission of said application(s) to the State; and  |  |  |  |
| WHEREAS, the applicant will enter into a contract with the State of California to complete the conservation easement;  |  |  |  |
| NOW, THEREFORE, BE IT RESOLVED that the (applicant's governing body) hereby:   |  |  |  |
| Approves the filing of an application for the (name of conservation easement), and   |  |  |  |
| <ol> <li>Certifies that said applicant has or will have available, prior to commencement of<br/>any work on the conservation easement included in this application, the sufficient<br/>funds to complete the conservation easement transaction; and</li> </ol>               |  |  |  |
| 2. Certifies that the applicant has or will have sufficient funds to monitor the property and maintain the stated objectives of the conservation easement, and   |  |  |  |
| 3. Certifies that the applicant has reviewed, understands, and agrees to the General Provisions contained in the contract shown in the Grant Administration Guide; and   |  |  |  |
| 4. Delegates the authority to <u>(designated position)</u> to conduct all negotiations, sign and submit all documents, including, but not limited to applications, agreements, amendments, and payment requests, which may be necessary for the completion of the grant; and |  |  |  |
| <ol> <li>Agrees to comply with all applicable federal, state and local laws, ordinances,<br/>rules, regulations and guidelines.</li> </ol>   |  |  |  |
| Approved and adopted theday of, 20   |  |  |  |
| I, the undersigned, hereby certify that the foregoing Resolution Numberwas duly adopted by the (Applicant's Governing Body) following a roll call vote:  |  |  |  |

(Clerk)

Ayes: Noes:

Absent:

#### Maps

#### **Provide the following maps:**

- 1. County Assessor's Parcel Map showing the parcel(s) to be acquired.
  - The parcel numbers shown in the parcel map must match the GRANT SCOPE/Cost Estimate Form.
- 2. Map showing highway or street access to the property.
- 3. Map showing any easements and/or encumbrances on, or encroachment near, the property.

#### **Proposal**

The proposal must respond to parts I and II below. Limit the response to a maximum of five 8  $\frac{1}{2}$ " x 11" pages, double-spaced, with 12-point regular Arial font. Do not include attachments.

- I. Identify the State Park unit that will be protected by the proposed CONSERVATION EASEMENT.
- II. Describe how the proposed CONSERVATION EASEMENT will meet one or more of the priorities listed below.
  - **A.** Protect scenic or historic landscapes that can be viewed from a neighboring State Park.
  - **B.** Contain important natural resources, <u>or</u> protect key watersheds, <u>or</u> provide critical linkages from California State Park land to other large blocks of protected habitat.
  - **C.** Contain important cultural resources <u>or</u> link a State Park to other protected cultural areas.
  - **D.** Buffer existing California State Park land from conflicts with other existing or proposed land uses.
  - **E.** Improve operations of an existing State Park or eliminate potential and/or existing management problems associated with the State Park.

#### PHASE II APPLICATION PACKET

Instructions for submittal of the Phase II APPLICATION PACKET

- Send one original unbound Phase II APPLICATION PACKET after receiving a Phase I qualification letter.
- Submit APPLICATION PACKET items in the order shown in the Checklist below.
- If a Checklist item does not apply, note "N/A" and provide a brief explanation.
- Send only the items shown in the Checklist. Do not send supplementary materials, such as power point presentations, videos, or letters of support.
- Descriptions and forms for each Checklist item can be found on the following pages:

#### **Phase II Application Packet Checklist**

| 1. | Grant Scope/Cost Estimate                                   | .Page 11 |
|----|---|----------|
| 2. | Baseline Conditions Report, Attachments, and Checklist Form | .Page 13 |
| 3. | Appraisal   | .Page 14 |
| 4. | California Environmental Quality Act (CEQA)Compliance       | .Page 14 |
| 5. | Copy of the Conservation Easement and Letters of Intent     | .Page 16 |
| 6. | Conservation Easement Requirements Checklist Form           | .Page 17 |
| 7. | Monitoring and Enforcement Budget Plan                      | .Page 18 |

Please do not send the Phase II APPLICATION PACKET before receiving a Phase I qualification letter.

#### **GRANT SCOPE/Cost Estimate Form**

This form has two uses:

- 1. Documents the CONSERVATION EASEMENT
- Provides a Cost Estimate of the PROJECT.

#### 1. Documenting the GRANT SCOPE:

This form establishes the expected GRANT deliverable for PROJECT COMPLETION. To be eligible for GRANT payment, the ACQUISITION of the CONSERVATION EASEMENT must be documented on the GRANT SCOPE/Cost Estimate Form.

This is an ACQUISITION only program. Construction and other site improvement costs are not eligible.

To document the ACQUISITION of the CONSERVATION EASEMENT on the GRANT SCOPE/Cost Estimate Form:

- List the county assessor's parcel number(s) <u>or</u> the deed recordation number(s) of the property subject to the CONSERVATION EASEMENT.
- List the draft CONSERVATION EASEMENT document name and date and the BASELINE CONDITIONS REPORT name and date.

2. Provide a Cost Estimate:

- Use the GRANT SCOPE/Cost Estimate form to estimate the PROJECT cost of the CONSERVATION EASEMENT.
  - The estimated PROJECT cost of the CONSERVATION EASEMENT can include associated ELIGIBLE COSTS such as the BASELINE CONDITIONS REPORT, an appraisal, drafting the CONSERVATION EASEMENT, and CEQA compliance, if the costs are incurred during the GRANT PERFORMANCE PERIOD.
  - Refer to the ELIGIBLE COSTS chart on page 19.
- The estimated total PROJECT cost on the GRANT SCOPE/Cost Estimate Form must equal the estimated total PROJECT cost listed on the Application Form.
- If the estimated PROJECT cost changes during the course of the PROJECT, a revised form is not required.

#### **GRANT SCOPE/Cost Estimate Form**

| GRANT SCOPE: Use this form to document the county assessor's parcel number(s) <u>or</u> the deed recordation number(s) of the property subject to the ACQUISITION of the CONSERVATION EASEMENT. Also include the draft CONSERVATION EASEMENT document name and date and the BASELINE CONDITIONS REPORT name and date on this form.  |
|---|
|   |
|   |
|   |
|   |
|   |
| Democrated on the American (Oran include acceptant deposits of the American acceptance and the  |
| Requested GRANT Amount (Can include associated ELIGIBLE COSTS such as the BASELINE CONDITIONS REPORT, an appraisal, drafting the CONSERVATION   |
| EASEMENT, and CEQA compliance incurred during the GRANT PERFORMANCE PERIOD. See the ELIGIBLE COSTS chart on page 19)  |
| \$  |
| Estimated Total Conservation Easement Cost \$   |
|   |
|   |
| The APPLICANT understands that this form establishes the expected GRANT deliverable. Therefore, the ACQUISITION of the CONSERVATION EASEMENT identified on this form must be completed and filed at the County Recorder's Office during the GRANT PERFORMANCE PERIOD THE APPLICANT understands that this form, the BASELINE CONDITIONS REPORT, and the CONSERVATION EASEMENT, will be incorporated into the GRANT CONTRACT. |
| APPLICANT'S AUTHORIZED REPRESENTATIVE Signature   |
| Date  |

#### **Baseline Conditions Report, Attachments, and Checklist Form**

Provide the BASELINE CONDITIONS REPORT, attachments, and the following checklist form at the time of APPLICATION to identify where the following items can be found:

The BASELINE CONDITIONS REPORT must asses the subject property's natural, cultural, and historical conservation values. The report must also document the condition of the property at the time of signing the CONSERVATION EASEMENT. The report must be detailed enough so that future changes in the condition of the subject property can be measured against the information in the report.

|           | Irrent condition of the natural, cultural, or historical elements of the operty that will be protected by the conservation Easement Pages  |
|-----------|--|
| 0         | The BASELINE CONDITIONS REPORT must include a narrative and photographs to document the current condition of those elements.   |
| De<br>o   | evelopment in or encroachment upon the subject property Page  The BASELINE CONDITIONS REPORT must describe all planned or current development or encroachment upon the subject property.   |
| <b>Ce</b> | The BASELINE CONDITIONS REPORT must include a certification statement confirming that it is a current and accurate description and representation of the condition and conservation values of the property's resources.  The certification statement must be signed and dated by the APPLICANT and the property owner. |
| Su<br>o   | Attach a copy of the deed, or the deed recordation number, or a title search, or a current county assessor's parcel map showing the current owner of the subject property.   |
| 0         | Attach a county assessor's parcel map showing the parcel(s) to be acquired.  The parcel numbers shown in the parcel map must match the GRANT SCOPE/Cost Estimate Form.   |
| 0         | Attach a list of any <i>other</i> leases, agreements, or other encumbrances affecting the use of the property.  If this item does not apply, note "N/A" and provide a brief explanation  |
| 0         | Attach a map showing highway or street access to the property.  Attach a map showing any easements on or encroachment near the property.   |

13

#### **Appraisal**

- Provide a qualified appraisal by a qualified appraiser.
- See Internal Revenue Code § 170(f)(11) for more information about qualified appraisals and appraisers.

#### California Environmental Quality Act (CEQA) Compliance

- Provide the CEQA Compliance Certification Form.
- Provide a copy of the Notice of Exemption or the Notice of Determination.
  - If a Notice of Exemption or a Notice of Determination were not completed, provide a letter from the Lead Agency that explains why, certifies that the PROJECT is CEQA compliant, and notes the date that the PROJECT was approved by the Lead Agency.

The APPLICANT should check with its local city or county planning agency for CEQA compliance information.

"CEQA" is the California Environmental Quality Act as stated in the Public Resources Code §21000 et seq.; Title 14 California Code of Regulations §15000 et seq. CEQA is a law establishing policies and procedures that require entities to identify, disclose to decision makers and the public, and attempt to lessen significant impacts to environmental and historical resources that may occur as a result of the entities' proposed PROJECT. For more information refer to <a href="http://ceres.ca.gov/ceqa/">http://ceres.ca.gov/ceqa/</a>.

| CEQA Compliance Certification Form  |   |   |
|---|---|---|
| Applicant/Grantee:  | Project Name  | :   |
| Project Address:  |   |   |
| When was CEQA analysis comp   | oleted for this                                     | project? Date   |
| What document(s) was filed for apply)   | this project's                                      | CEQA analysis: (check all that  |
| □Initial Study □Notice of   | Exemption [   | □Negative Declaration   |
| ☐Mitigated Negative Decla   | ration  |   |
| □Environmental Impact Re  | port □Other   | <br>·   |
| explaining why, certifying the product that the project was approve                                 | ted please atta<br>roject has con<br>ved by the Lea | nch a letter from the Lead Agency nplied with CEQA and noting the   |
| Lead Agency Contact Information   | on:   |   |
| Agency Name: Contact Pe   | erson:  |   |
| Mailing Address:  |   |   |
| Phone: () Email:  |   |   |
| with the California Environmental and that the project is described in construction or acquisition. | Quality Act (CE<br>n adequate and                   | e has determined that it has complied EQA) for the project identified above I sufficient detail to allow the project's accompasses all aspects of the work to |
| AUTHORIZED REPRESENTATIVE (Signature)   | Date  | AUTHORIZED REPRESENTATIVE (Printed Name and Title)  |

#### **Copy of the Conservation Easement and Letters of Intent**

Provide the following three items:

- 1. A copy of the CONSERVATION EASEMENT that meets the requirements listed in the Conservation Easement Requirements Checklist Form found on page 17.
- 2. A letter from the APPLICANT which includes a commitment to sign the proposed CONSERVATION EASEMENT should the GRANT be awarded.
- 3. A corresponding letter from the landowner which includes a commitment to sign the proposed CONSERVATION EASEMENT should the GRANT be awarded.

Note: If a GRANT is awarded, the APPLICANT must send the signed CONSERVATION EASEMENT to OGALS <u>before</u> the GRANT CONTRACT can be signed by DPR.

#### **Conservation Easement Requirements Checklist Form**

This checklist form lists the required elements of the CONSERVATION EASEMENT.

Provide this checklist with the Phase II APPLICATION to identify where the required elements can be found in the proposed CONSERVATION EASEMENT. Attach a copy of the CONSERVATION EASEMENT and highlight the sections of the CONSERVATION EASEMENT that meet the requirements listed below.

| Term of the agreementPage  o The term of the agreement must be in perpetuity. |
|---|
| Conservation Objectives   |
| Property Uses and Activities  |
| <ul> <li>Monitoring and Enforcement</li></ul>                                 |

#### **Monitoring and Enforcement Budget Plan**

DPR requires the monitoring and enforcement budget plan to determine that the APPLICANT has sufficient long-term financial resources to fulfill the obligations below.

Provide a budget plan that identifies funding sources for:

- 1. Monitoring the property annually in perpetuity after escrow is closed and the CONSERVATION EASEMENT is recorded at the County Recorder's Office.
- 2. Legally defending any violations of the CONSERVATION EASEMENT in perpetuity after escrow is closed and the CONSERVATION EASEMENT is recorded at the County Recorder's Office.

Note: Ongoing monitoring and enforcement of the CONSERVATION EASEMENT after PROJECT COMPLETION are not ELIGIBLE COSTS.

### **Eligible Costs Chart**

This section provides rules and examples of ELIGIBLE COSTS for the CONSERVATION EASEMENT.

| CONSERVATION EASEMENT COSTS (Up to 100% of GRANT Amount)  | EXAMPLES  |
|---|---|
| Purchase price of the CONSERVATION EASEMENT and other activities necessary to complete the ACQUISITION. | <ul> <li>Appraisals, surveys</li> <li>Baseline Conditions Report</li> <li>CEQA Compliance</li> <li>Preliminary title reports</li> <li>Title insurance fees</li> <li>Escrow fees and purchase price</li> <li>Relocation costs: costs resulting in displacement of tenants (not land owners or GRANTEES) pursuant to Government Code §§7260 – 7277.         <ul> <li>If the GRANT is not paying for relocation costs, the GRANTEE must ensure that</li> </ul> </li> </ul> |
|   | displaced tenants are paid in compliance with Government Code §§7260 – 7277.  • Employee services: see accounting rules for employee services explained in the GRANT ADMINISTRATION GUIDE.  • PROJECT/GRANT administration and accounting   |

| INELIGIBLE COSTS     | EXAMPLES OF INELIGIBLE COSTS   |
|----------------------|--|
| Cannot be charged to | <ul> <li>Outside the GRANT PERFORMANCE PERIOD — costs incurred before<br/>or after the GRANT PERFORMANCE PERIOD.</li> </ul>  |
| the GRANT            | Construction or other site improvement costs.  |
|                      | <ul> <li>Indirect costs – overhead business expenses of the GRANTEE'S         fixed or ordinary operating costs: (rent, mortgage payments,         property taxes, utilities, office supplies).</li> </ul> |
|                      | Ongoing Monitoring and Enforcement of the CONSERVATION<br>EASEMENT   |
|                      | Fundraising  |
|                      | • Food   |
|                      | Grant Writing  |

#### **Definitions**

Capitalized words and terms used in this procedural guide are defined below.

**ACQUISITION** – to obtain a CONSERVATION EASEMENT.

**ADVANCE** – payment made to the GRANTEE for work that will occur in the future or work that has already occurred during the GRANT PERFORMANCE PERIOD and has not been paid for by the GRANTEE.

**APPLICANT** – an entity which does not yet have a fully-executed CONTRACT with DPR, and is requesting GRANT funding by submitting an APPLICATION PACKET.

**APPLICATION PACKET** – the Application form and its required attachments listed in the Phase I Application Checklist on page 4 and Phase II Application Checklist on page 10.

**APPROPRIATION DATE** — when program funding is authorized by the legislature. The APPROPRIATION DATE is the start of the GRANT PERFORMANCE PERIOD.

**ARPSD** – DPR's Acquisition and Real Property Services Division.

**AUTHORIZED REPRESENTATIVE** – the APPLICANT'S/GRANTEE'S designated position authorized in the Resolution to sign all GRANT documents. The AUTHORIZED REPRESENTATIVE may designate an alternate by informing OGALS in writing.

**BASELINE CONDITIONS REPORT** – an assessment of the land's natural, cultural, and historical conservation values that documents the property's condition at the time of signing the CONSERVATION EASEMENT. The baseline conditions report must be detailed enough so that future changes in the condition of the property can be measured against the information in the report.

CEQA – the California Environmental Quality Act as stated in the Public Resources Code §21000 et seq.; Title 14 California Code of Regulations §15000 et seq. CEQA is a law establishing policies and procedures that require entities to identify, disclose to decision makers and the public, and attempt to lessen significant impacts to environmental and historical resources that may occur as a result of the entities' proposed PROJECT. For more information see <a href="http://ceres.ca.gov/ceqa/">http://ceres.ca.gov/ceqa/</a>.

**CONSERVATION EASEMENT** – a limitation in a recorded instrument that contains an easement, restriction, covenant, condition, or offer to dedicate, that has been executed by or on behalf of the owner of the land subject to that limitation and is binding upon successive owners of the land, and the purpose of which is to retain land predominantly in its natural, scenic, historical, agricultural, forested, or open-space condition. "Conservation easement" includes a conservation easement as defined in Section 815.1 of the Civil Code, an open-space easement as defined in Section 51075 of the Government Code, and an agricultural conservation easement as defined in Section 10211.

**CONTRACT** – an agreement between the DPR and the GRANTEE specifying the performance of the GRANT SCOPE within the GRANT PERFORMANCE PERIOD, and other GRANT obligations between the GRANTEE and DPR.

**DART** – DPR's acquisition review team.

**DPR** – the California Department of Parks and Recreation.

**ELIGIBLE COSTS** – expenses incurred <u>during</u> the GRANT PERFORMANCE PERIOD to complete the GRANT SCOPE approved by OGALS through a fully executed CONTRACT.

**GRANT** – amount of funds made available to a GRANTEE for completion of the GRANT SCOPE during the GRANT PERFORMANCE PERIOD.

**GRANTEE** – an entity having a CONTRACT with DPR for a CONSERVATION EASEMENT GRANT.

**GRANT ADMINISTRATION GUIDE** – the document titled the "Grant Administration Guide for Conservation Easements Pursuant to Public Resources Code Division 5, Chapter 1, § 5011.7" available from OGALS. The guide provides requirements and forms for GRANT administration.

GRANT PERFORMANCE PERIOD – the period of time, starting with the APPROPRIATION DATE, that ELIGIBLE COSTS may be incurred by the GRANTEE and charged to the GRANT, and ending eight years after the APPROPRIATION DATE.

**GRANT SCOPE** – The ACQUISITION of the CONSERVATION EASEMENT described in the GRANT SCOPE/Cost Estimate Form that will be purchased by the GRANT.

**NON PROFIT LAND TRUST ORGANIZATION** — "Nonprofit land trust organization" means a nonprofit organization described in Section 501(c)(3) of the Internal Revenue Code (26 U.S.C. Sec. 501(c)(3)), that is exempt from taxation under Section 501(a) of that code (26 U.S.C. Sec. 501(a)), and that has among its purposes the conservation of natural or cultural resources.

ogals - DPR's Office of Grants and Local Services.

**PLANNING** – DPR's Planning Division.

**PROJECT** – the ACQUISITION of the CONSERVATION EASEMENT described in the GRANT SCOPE/Cost Estimate Form, and associated ELIGIBLE COSTS funded by the GRANT.

**PROJECT COMPLETION** – when escrow is closed and the CONSERVATION EASEMENT is recorded at the County Recorder's Office.

**PROJECT OFFICER** – an OGALS employee who acts as a GRANT administration contact for APPLICANTS and GRANTEES.

**TOTAL PROJECT COST** – the combined dollar amount of all sources to complete the CONSERVATION EASEMENT listed in the GRANT SCOPE/Cost Estimate Form.