



## Local & Nonprofit Acquisition Procedure Checklist

GA Project #: \_\_\_\_\_ GA Project Manager: \_\_\_\_\_

GA Project Name: \_\_\_\_\_ GA PM email: \_\_\_\_\_

GA Owner #: \_\_\_\_\_ Parcel Name: \_\_\_\_\_

Block(s)/Lot(s): \_\_\_\_\_

**Please note:**

- Below is a listing of steps for a Green Acres acquisition in the order they generally occur. If you anticipate proceeding outside this order, please review [Operating Outside the Standard Green Acres Acquisition Process](#).
- If parcel is a cooperative acquisition, please review the [Cooperative Acquisition Project Guidelines](#) for ways in which procedures for these acquisitions differ.
- If acquisition is an easement, please review the [Easement Acquisition Procedures and Standards](#) for ways in which procedures for these acquisitions differ.

### OBLIGATION DOCUMENTS

- Project Agreement package received from GA
- Local governments: Update or amend Recreation and Open Space Inventory, as needed
- Project Agreement package completed as per transmittal letter:
  - Project Agreements signed on signature page and, for local governments, on Declaration signature page
  - PA signed by person identified in resolution
  - Resolution passed by governing body
  - Resolution uses template language, including identifying applicant's required match
  - Funding amounts in resolution match those in Project Agreement
  - [Fiscal forms](#) complete, including two signatures & bank letter or copy of cancelled check
- Signed Project Agreement package submitted to GA Project Manager
- Executed copy of Project Agreement received
  - Date of PA: \_\_\_\_\_ Project period expires: \_\_\_\_\_

### APPRAISAL (for more detail, please refer to the [Acquisition Property Appraisal Procedures](#))

- Procedural Letter received from GA
- Inspect structures on property to determine if possibly historic (see [Structures policy](#))
  - If possibly historic, submit Request for Determination to the State Historic Preservation Office [website](#)
- Complete [Pre-Appraisal Package](#) submitted to GA Project Manager, including:
 

<b>Required:</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Pre-Appraisal Fact Sheet</li> <li><input type="checkbox"/> Property Eligibility and Future Use Questionnaire</li> <li><input type="checkbox"/> Project Reference Map</li> </ul>	<b>Submit if applicable:</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Historic inspection report for structures</li> <li><input type="checkbox"/> <a href="#">Proposed Cooperative Acquisition Information Form</a></li> <li><input type="checkbox"/> <a href="#">Proposed Easement Acquisition Information Form</a></li> </ul>
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- Eligibility confirmation and appraisal authorization and instructions received from GA
- Appraiser(s) hired and provided with GA [Scope of Work](#) and appraisal instructions (see [List](#) of approved appraisers)
- On-site appraiser meeting arranged, unless waived by GA
- Appraisal report(s) and Reviewer Checklist(s) submitted for GA review
- If applicable, approval of proposed use of structures to be retained after closing
- If applicable, requests from GA to appraiser(s) addressed within 45 days
- Certified Market Value (CMV) or Average of Appraised Values (AAV) received from GA

### PRELIMINARY ASSESSMENT (Complete concurrently with Appraisal) (for more detail, please refer to [FAQs](#))

- Environmental consultant hired
- Preliminary Assessment Report (PAR) and [Checklist](#) submitted to GA Project Manager
- PAR Review Memo received from GA
- Additional information/documents submitted to GA, *if requested in PAR review memo*:
 

<ul style="list-style-type: none"> <li><input type="checkbox"/> Answers to questions posed in memo</li> <li><input type="checkbox"/> Results of geophysical survey</li> <li><input type="checkbox"/> Site Investigation Report</li> <li><input type="checkbox"/> Proof of well decommissioning</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Proof of septic system removal/closure</li> <li><input type="checkbox"/> Proof of proper solid waste disposal</li> <li><input type="checkbox"/> Underground Storage Tank testing/removal</li> <li><input type="checkbox"/> Above Ground Storage Tank removal</li> </ul>
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- If applicable, Potential Historic Pesticide Use Certification Form submitted
- If applicable, RAO/Deed Notice submitted by LSRP to GA
- Final Review Memo Approval for GA Participation received
- Final PAR Cert form sent to GA

## TITLE COMMITMENT

- Title company engaged
- Title insurance commitment report submitted to GA Project Manager
  - *Before submitting*, confirmed that report conforms with [Title checklist](#)

## SURVEY

- Future road rights-of-way identified
- Surveyor hired and provided with Survey [Scope of Work](#) and [Guidelines](#)
  - Title commitment and road ROW information transmitted to surveyor
- Complete Survey Package submitted to GA Project Manager, including:
  - Full Size Paper Copies of Plan (2)
  - Signed Surveyor's Certification Form
  - Legal Description (2)
  - Reduced survey (8.5"x11") attached to legal descriptions
  - Digital Media Disk (standard 5.25-inch CD-R)
  - Checklist of Work completed
- Revisions sent to GA, if requested
- Survey GA Certified
- If Net Green Acres Encumbrance figure (see Survey Certification) differs from the appraised acreage (see CMV/AAV), refer to the [Changes in Acreage](#) policy to determine any change in GA participation
- Survey transmitted to title company
  - Title endorsement removing survey exception issued and submitted to GA Project Manager

## LEGAL DOCUMENTS

- If cooperative project, draft Partnership Agreement submitted to GA Project Manager
  - *Before submitting*, confirmed that draft conforms with [Partnership Agreement checklist](#)
  - Any necessary revisions made
  - Partnership Agreement executed and submitted to GA Project Manager
- Fully executed Contract of Sale submitted to GA Project Manager
- Draft Deed submitted to GA Project Manager
  - *Before submitting*, confirmed that report conforms with [Deed checklist](#)
- For nonprofit acquisition without a local government partner, draft Deed of Conservation Restriction based on template submitted to GA Project Manager
- For condemnation acquisitions, Declaration of Taking submitted to GA Project Manager
- Final Site Inspection conducted with GA Project Manager
- GA sign delivered/sent

## PAYMENT DOCUMENTS

- Payment request submitted to GA Project Manager, including:
  - [Acquisition Payment Request Form](#)
  - Copies of vendor invoices
  - Copies of cancelled checks
- Payment voucher(s) received from GA Project Manager
- Voucher package submitted to GA Project Manager, including:
  - Signed payment voucher(s)
  - Confirmation that there has been no change in bank account information
- If funds are required for closing, closing date approved by GA Project Manager

### **Please note:**

Green Acres funding will only be released if: (1) The applicant is making significant progress resolving any outstanding compliance issues, as determined by Green Acres' Bureau of Legal Services and Stewardship; and (2) For local governments, Green Acres has approved the applicant's Recreation and Open Space Inventory.

## CLOSEOUT DOCUMENTS

- Green Acres sign posted at property entrance
- Title insurance policy submitted to GA Project Manager
  - *Before submitting*, confirmed that policy conforms with [Title checklist](#)
- Recorded deed submitted to GA Project Manager
- Remaining fiscal documentation submitted to GA Project Manager (e.g., canceled check for land acquisition)
- If applicable for nonprofit project, recorded Deed of Conservation Restriction submitted to GA Project Manager
- If local government project, Declaration of Encumbrance/ROSI transmitted to County Clerk's Office for recording
  - Copy of transmittal letter submitted to GA Project Manager
  - Copy of recorded Declaration of Encumbrance/ROSI submitted to GA Project Manager
- Nonprofits (*if applicable*) apply for [Tax Exemption](#) by August 1<sup>st</sup> for each block and lot preserved.