

**Environment and Natural Resources Trust Fund
2009 Phase 2 Request for Proposals (RFP)**

LCCMR ID: 033-A4

Project Title: Bertram Chain of Lakes Phase 2 Acquisition

Total Project Budget: \$ \$6,800,000

Proposed Project Time Period for the Funding Requested: July 2009-December 2010

Other Non-State Funds: \$ \$10,100,000.00

Priority: A1. Critical Lands Analysis

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Last Name: O'Neill

Sponsoring Organization: City of Monticello

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Region:

Metro

County Name:

Wright

City / Township:

Monticello

Summary: Acquire 1,200 acres in Wright County currently owned by the YMCA of Minneapolis. The acquisition will allow for protection of three undeveloped lakes, shoreline vegetation and undisturbed natural habitats.

Main Proposal: 0908-2-010-proposal-2009_Monticello_main_proposal.doc

Project Budget: 0908-2-010-budget-RFP_2009 Monticello Project Budget.xls

Qualifications: 0908-2-010-qualifications-2009 LCCMR Monticello Project Manager.doc

Map: 0908-2-010-maps-2009_LCCMR Map_blk_wht.pdf

Letter of Resolution: 0908-2-010-resolution-2009 LCCMR Monticello Resolutions.pdf

PROJECT TITLE: The Bertram Chain of Lakes Acquisition

I. PROJECT STATEMENT

The City of Monticello and Wright County are submitting a request for \$6.8 million in funding from the LCCMR. The funding supports the continued effort to acquire 1,200 acres in Wright County (Monticello Township/Monticello City), currently owned by the YMCA of Minneapolis. The public acquisition of the property will allow for the preservation and protection of shore land, open space, natural resources and provide access for public recreation and natural resource education.

Wright County and the City of Monticello are asking the LCCMR to supplement a \$20.5 million acquisition project. LCCMR has committed \$1 million to this acquisition as part of the 2008 funding cycle. The Metro Conservation Corridors program has also awarded a grant of \$200,000 to the acquisition effort. As matching State funds are secured, the balance of funding for the acquisition will come from Wright County and the City of Monticello. To further support the purchase, the City and County are developing an agreement with the YMCA, outlining how the property could be acquired as funding is secured.

The 1,200 acres of the Bertram Chain of Lakes property represents three undeveloped lakes (including 5.75 miles of lake shore and 1.5 miles of streams), 245 acres of mixed vegetation and wetlands, 211 acres of lake surface, and 140 acres of active agricultural fields. The area provides high quality wildlife habitat and water resource opportunities for the region. The City of Monticello is completing a Natural Resource Inventory and Assessment (NRI/A) project, which is revealing more information on the natural value of this property, including the documentation of a mature ironwood forest and the presence of two glacial eskers, a rare geological find in Wright County.

The vision for the Bertram Chain of Lakes is that it will serve the entire region and beyond. The development and management of this park will be a collaborative effort between the City of Monticello and Wright County. This joint effort will maximize the recreational and natural resource education opportunities available. Additionally, a continuing partnership with the YMCA will leverage the recognition and resources of a major community partner. These goals align with LCCMR's stated considerations for funding.

The vision of the Bertram Chain of Lakes as a regional park also meets the stated goal of the State Comprehensive Outdoor Recreation Plan (SCORP), which is to increase participation in outdoor recreation by all Minnesotans and visitors. The acquisition of this property will allow for the continued protection in the face of surrounding growth, and offer the chance to restore natural resources native to the area. It will allow for the creation of new sustainable recreation programs and experiences. It will draw on the existing client base of the YMCA to promote participation in nature-oriented programs, and continue their expansion. The purchase will enable the creation of a park plan that proactively addresses the recreational needs of the region, from active play facilities to passive natural areas.

The reality is that Bertram Chain of Lakes is located in a county that recently experienced tremendous growth and is poised for future growth. The property lies just one mile from Interstate 94 and just minutes from the developed area of the City of Monticello. There is no development along the shore land, within riparian areas, or within the 615 acres of woods. The majority of lakes throughout Wright County are developed, making this property rare not only in Wright County but throughout most of Minnesota. As the City of Monticello and Wright County continue to grow, the need for the protection of this natural area and its inclusion into park planning becomes more important.

The City of Monticello and Wright County are working together to bring vision to reality. Recognizing the potential acquisition as a once-in-a-lifetime opportunity, the City of Monticello and Wright County, in partnership with the YMCA, have dedicated themselves to the goal of preserving the Bertram Chain of Lakes as public lands. Public ownership of the Bertram Chain of Lakes will ensure that opportunities for outdoor recreation are not lost and a tremendous natural asset will be preserved for the future enjoyment of all.

The commitment of financial resources will help protect the Bertram Chain of Lakes' shore land, natural resources, water quality, and recreational and outdoor opportunities for generations to come. However, the acquisition will require more funds than those that are available at a local level. It is for this reason that the City of Monticello and Wright County are asking the LCCMR to consider contributing additional funding through the 2009 cycle. LCCMR's continued commitment will help realize the vision for the Bertram Chain of Lakes.

II. DESCRIPTION OF PROJECT RESULTS

Result 1: Acquisition/Fee Title Purchase of 1,200 Acres

Budget: \$6.8 million in matching funds (\$1.2 million has been allotted through the 2008 cycle).

Completion of a joint appraisal process by the YMCA and the City of Monticello/Wright County has yielded a final negotiated purchase price of \$20.5 million, with the cost of infrastructure and park development yielding a total project cost of \$24 million.

Deliverables and Completion Date:

The parkland purchase will include 1,200 acres and the fee title will be held jointly between Wright County and the City of Monticello. The acquisition will occur in phases as funding is secured. A first phase acquisition date has been targeted for December 31, 2008.

III. PROJECT STRATEGY AND TIMELINE

A. Project Partners

The acquisition of the Bertram Chain of Lakes is a partnership between the City of Monticello and Wright County. The City of Monticello and Wright County have formed a task force made up of elected officials and staff to work toward the property purchase. The task force continues to have a verbal agreement with the YMCA of Minneapolis for exclusive purchase negotiations.

The City of Monticello and Wright County have begun drafting agreements which would commit each to a matching funds contribution for the purchase. Without matching State funds, the total acquisition will not be possible.

B. Project Impact

The project will directly impact the residents of the City of Monticello (population 11,253) and greater Wright County (population 116,780), through recreational opportunities which include access to trails, water and shore land, play facilities, and other natural areas.

C. Time

The City and County have negotiated a verbal purchase option with the YMCA which will allow the City and County to hold the \$20.5 million purchase price until December 2012. This agreement offers the City of Monticello and Wright County the opportunity to raise funds through private donations, future LCCMR requests, state bonding proceeds and other funding sources. Each of these funding sources are critical pieces to the total acquisition of the Bertram Chain of Lakes.

D. Long-Term Strategy

The City of Monticello and Wright County recognize that the acquisition of the property is the first step in achieving the larger vision for the Bertram Chain of Lakes. The future requires that the task force plan for the development of recreational infrastructure, restoration and conservation of sensitive natural areas, and the creation of educational programming. Each of these will require careful analysis and assessment, financial planning and budgeting, and coordinated management and maintenance components. It is expected that the long-term improvements in these areas will be made through capital investment by the City of Monticello, as well as through grant programs, partnerships and donations.

Project Budget

INSTRUCTIONS AND TEMPLATE (1 PAGE LIMIT)

(One page limit, single-sided, 10 pt. font minimum Retain the bold text and remove all instructions typed in italics. Add or delete rows as is necessary. If a category is not applicable you may write "N/A", leave it blank, or delete the row.)

IV. TOTAL PROJECT REQUEST BUDGET

BUDGET ITEM <i>(See list of Eligible & Non-Eligible Costs, p. 17)</i>	AMOUNT	% FTE
Personnel:	\$ -	%
Contracts:	\$ -	
Equipment/Tools:	\$ -	
Acquisition (Including Easements): 1,200 acres, fee title held by the City of Monticello and Wright County	\$ 6,800,000	
Restoration:	\$ -	
Other:	\$ -	
	\$ -	
TOTAL PROJECT BUDGET REQUEST TO LCCMR	\$ 6,800,000	

V. OTHER FUNDS

SOURCE OF FUNDS	AMOUNT	Status
Remaining \$ From Previous Trust Fund Appropriation (if applicable):	\$ 1,000,000	Unspent to Date
Other Non-State \$ Being Leveraged During Project Period:		
Other State \$ Being Spent During Project Period: Metro Greenways Grant - 2008	\$ 200,000	Unspent to Date
In-kind Services During Project Period: Wright County and the City of Monticello have contributed staff and consultant personnel over a one year period to-date, including park planning, legal opinion, appraisal services, natural resource inventory, and other tasks.		On-going
Past Spending: Please see above.		

Project Manager Qualifications:

Jeff O'Neill has worked as City Administrator for the City of Monticello for two years. For a number of years prior to becoming City Administrator, he served the City as Community Development Director. In his capacity as Community Development Director, he successfully applied for a variety of grants through the Minnesota Department of Transportation and through the Minnesota Department of Economic Development. Involvement with the grant awards required keeping financial accounts of expenses, labor, and materials, and closing out grants in a timely and organized fashion. Mr. O'Neill is responsible for overseeing the development of the City's long and short term park, trail and open space plans as well as day-to-day maintenance activities. He also oversees preparation of the City's annual budget. He has also been extensively involved in planning, financing and development of a wide variety of city infrastructure and facilities. Many of these projects include involvement with property acquisition.

Prior to his employment with the City of Monticello, he worked for two years with the City of Watertown as its City Coordinator and four years as an Administrative Assist/Management Analyst for the City of Coon Rapids. In 1979 he obtained a Bachelor of Science Arts Degree from Gustavus Adolphus College with majors in Political Science and Criminal Justice. In 1984, O'Neill obtained a Master's Degree in Urban and Regional Studies from Minnesota State University.

Organization Description:

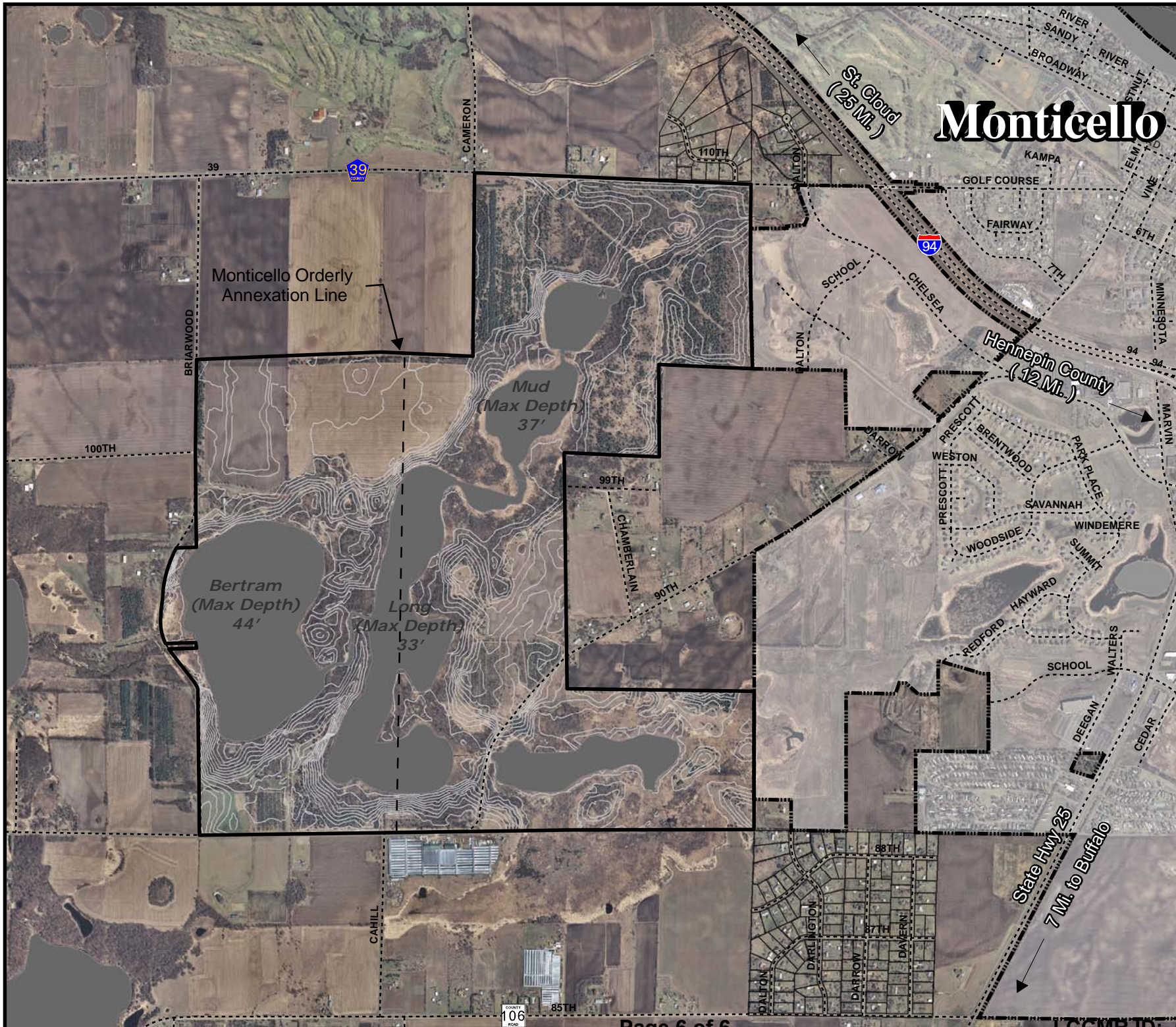
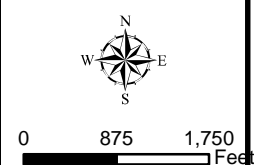
The City of Monticello, population 11,253, is a Local Government Unit located on the northeastern edge of Wright County.



2009 LCCMR Proposal Map

Legend

- Acquisition Boundry
- Roads
- City of Monticello
- 5' Contours



Monticello

Monticello Orderly Annexation Line

COUNTY 106
SHEET 85TH