

**Environment and Natural Resources Trust Fund  
2011-2012 Request for Proposals (RFP)**

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**LCCMR ID: 108-D**

**Project Title:** Bertram Chain of Lakes Regional Park Acquisition

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**Category:** D. Land Acquisition for Habitat and Recreation

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**Total Project Budget:** \$ \$758,000

**Proposed Project Time Period for the Funding Requested:** 1.5 yrs, July 2011 - Dec 2012

**Other Non-State Funds:** \$ 841,380

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**Summary:**

The City of Monticello and Wright County are submitting an LCCMR funding proposal to support a fourth phase of property acquisition at the Bertram Chain of Lakes Regional Park.

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**Sponsoring Organization:** City of Monticello

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Monticello MN 55362

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**Email:** angela.schumann@ci.monticello.mn.us

**Web Address:** www.ci.monticello.mn.us

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**Location**

**Region:** Metro

**Ecological Section:** Minnesota and NE Iowa Morainal (222M)

**County Name:** Wright

**City / Township:** City of Monticello/Monticello Township

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_____ Funding Priorities	_____ Multiple Benefits	_____ Outcomes	_____ Knowledge Base
_____ Extent of Impact	_____ Innovation	_____ Scientific/Tech Basis	_____ Urgency
_____ Capacity Readiness	_____ Leverage	_____ Employment	_____ TOTAL _____%

## 2011-2012 MAIN PROPOSAL

**PROJECT TITLE:** Bertram Chain of Lakes Regional Park - Phase IV Acquisition

### I. PROJECT STATEMENT

The City of Monticello and Wright County are submitting a request for \$758,000 in funding from the Environmental & Natural Resources Trust Fund. This funding will support a fourth acquisition at the Bertram Chain of Lakes, furthering efforts to acquire the full 1,200 acres, located in Wright County.

There are two specific goals for this project. The first is to preserve and protect the shore land, open space, and natural resources present at the Bertram Chain of Lakes. The second is to provide access to these resources for public recreation and enjoyment. Together, these goals will enrich the quality of life for the entire region and beyond for generations. To achieve these goals, and the total realization of the regional park, the County and City propose to utilize a variety of funding sources. Following is detail on the proposed park phasing structure and the joint funding request being made to the LCCMR.

**Phase I:** In 2008, with assistance from the Environmental and Natural Resources Trust Fund and the DNR Metro Greenways program, Wright County and the City of Monticello purchased 319 acres of the Bertram Chain of Lakes property. This land is already being utilized for public recreation and active habitat preservation. At this time, 881 acres of the original 1,200 acre property remains under ownership of the YMCA of Minneapolis.

**Phase II:** A second park acquisition will be completed in June of 2010. In 2009, Metro Greenways awarded the Bertram Chain of Lakes project \$549,628, which is being matched by the City and County at \$274,814 each. The Phase II acquisition will consist of approximately 51.54 land and water acres (pending a final appraisal), which will be contiguous to the current 319 acre public property boundary.

**Phase III:** The County and City have secured a 2009 Clean Water, Land & Legacy Amendment (Parks and Trails Fund) grant in the amount of \$400,000, and a \$266,249 grant from the 2009 DNR Non-Metro Regional Parks program. The City and County have also submitted 2010 applications to these two sources to further expand the boundary of a Phase III acquisition. The goal is to purchase approximately 170 acres in 2011, creating a 625 acre regional public park, featuring access to two undeveloped lakes.

**Phase IV:** For 2011-2012, LCCMR assistance is being requested to complete the purchase of 60.32 land acres of property directly adjacent to land acquired under Phases I and II. This phase would extend the current regional park boundary north along the shores of Long Lake. The purchase area includes approximately 86 total acres of land and water, with 48 acres of forest lands and wetland fringe, including shrub swamps that grade into lowland hardwood swamps. The proposed purchase also includes shoreline on the west and east sides of Long Lake, as well as the entire channel connecting Mud and Long Lakes.

**Park Completion:** With the ultimate goal of acquiring all 1,200 acres of the Bertram Chain of Lakes in mind, the development of a concept master plan for the park is underway. This effort is led by a citizen and elected representative Advisory Council. The plan provides a framework for conserving Bertram's natural resources while integrating them into recreational and educational opportunities for the public.

The realization of the Bertram Chain of Lakes as a 1,200 acre regional park requires more funds than those that are available at a local level. For this reason, the City of Monticello and Wright County will continue to seek out opportunities to support local contributions. The commitment of financial resources will help protect the Bertram Chain of Lakes' many assets for generations to come and offer the chance for more Minnesotans to connect with an irreplaceable resource.

## II. DESCRIPTION OF PROJECT ACTIVITIES

### Activity 1: Acquisition/Fee Title Purchase of 60 Acres

This request is for land acquisition only. Wright County and the City of Monticello will begin developing infrastructure, restoration, stabilization, and program efforts once the acquisition is complete.

**Budget:** \$758,000 in funding is requested, which will be locally matched with \$841,380 in funding.

Outcome	Completion Date
1. Acquisition/Fee Title Purchase of 60.32 Acres (85.99 acres land and water)	December 31, 2012

## III. PROJECT STRATEGY

### A. Project Team/Partners

The acquisition of the Bertram Chain of Lakes is a partnership between Wright County and the City of Monticello. The City of Monticello and Wright County will be equal financial contributors in the acquisition effort and will jointly own and manage the park. The City and County have a formal agreement with the YMCA of Minneapolis for exclusive purchase negotiations for the complete 1,200 acres. In addition, the City of Monticello and Wright County have formed a representative group of elected officials and citizens known as the Bertram Chain of Lakes Advisory Council to guide the master planning process for the regional park.

### B. Timeline Requirements

The City and County have negotiated a written Memorandum of Understanding with the YMCA which will allow the City and County to hold the \$20.5 million purchase price until December 2013. 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 is critical to the total acquisition of the Bertram Chain of Lakes.

### C. Long-Term Strategy and Future Funding Needs

The acquisition of the Bertram Chain of Lakes property is only the first step in achieving the larger vision for the Bertram Chain of Lakes. Long-term, the City and County, with the assistance of the Bertram Chain of Lakes Advisory Council, will 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 and Wright County, as well as through grant programs, private partnerships and donations.

## 2011-2012 Detailed Project Budget

### IV. TOTAL TRUST FUND REQUEST BUDGET: Two (2) years

BUDGET ITEM	AMOUNT
<b>Acquisition:</b> Fee title acquisition of 85.99 acres (land and water) of the 1200 acres of the Bertram Chain of Lakes Regional Park. City and County to match \$841,380 to complete acquisition.	\$ 758,000
<b>TOTAL ENVIRONMENT &amp; NATURAL RESOURCES TRUST FUND \$ REQUEST</b>	<b>\$ 758,000</b>

### V. OTHER FUNDS

SOURCE OF FUNDS	AMOUNT	Status
<b>Other State \$ Being Applied to Project During Project Period:</b> DNR Metro Greenways Grant - 2009 (2009 DNR Metro Greenways grant funds are allocated from the Environmental & Natural Resources Trust Fund)	\$ 549,628	<b>Secured.</b> Allocated for June, 2010 Phase II acquisition
<b>Other Non-State \$ Being Applied to Project During Project Period:</b> Wright County matching funds for the 2009 Metro Greenways allocation.	\$ 274,814	<b>Secured.</b> Allocated for June, 2010 Phase II acquisition
<b>Other Non-State \$ Being Applied to Project During Project Period:</b> City of Monticello matching funds for the 2009 Metro Greenways allocation.	\$ 274,814	<b>Secured.</b> Allocated for June, 2010 Phase II acquisition
<b>Other State \$ Being Applied to Project During Project Period:</b> Non-Metro Regional Parks - 2009	\$ 266,249	<b>Secured.</b> Allocated to Phase III acquisition
<b>Other State \$ Being Applied to Project During Project Period:</b> MN Clean Water, Land & Legacy Grant (Parks & Trails) - 2009	\$ 400,000	<b>Secured.</b> Allocated to Phase III acquisition
<b>In-kind Services During Project Period:</b>	\$ -	On-Going
<b>Funding History:</b> LCCMR/Environmental & Natural Resource Trust Fund Allocation - 2008	\$ 1,000,000	<b>Spent.</b> Utilized in conjunction w/2008 Metro Greenways to purchase 319 acres at Bertram Lakes - Phase I acquisition
<b>Funding History:</b> DNR Metro Greenways Grant - 2008 (2008 DNR Metro Greenways funds were allocated from the Environmental & Natural Resources Trust Fund)	\$ 200,000	<b>Spent.</b> Utilized in conjunction w/2008 LCCMR/Environmental & Natural Resources Trust Fund to purchase 319 acres at Bertram Lakes - Phase I acquisition
<b>Funding History:</b> City of Monticello Match - 2008 (Matching funding for 2008 LCCMR/Environmental & Natural Resources Trust Fund and Metro Greenways allocations)	\$ 1,200,000	<b>Spent.</b> Utilized in conjunction w/2008 LCCMR and Metro Greenways to purchase 319 Acres at Bertram Lakes - Phase I acquisition
<b>Funding History:</b> Wright County Match - 2008 (Matching funding for 2008 LCCMR/Environmental & Natural Resources Trust Fund and Metro Greenways allocations)	\$ 1,200,000	<b>Spent.</b> Utilized in conjunction w/2008 LCCMR & Metro Greenways to purchase 319 acres at Bertram Lakes - Phase I acquisition

## 2011-2012 Acquisition List for Environment and Natural Resources Trust Fund Proposal

**Project Title:** Bertram Chain of Lakes Regional Park - Phase IV Acquisition

**Project Manager Name:** Angela Schumann

**Environment and Natural Resources Trust Fund \$ Request:** \$758,000

**Final Title Holder(s):** City of Monticello, Wright County

#	Parcel Name	Acquisition Type (Fee-Title OR Conservation Easement)	County	Estimated # of Acres	Geographical Coordinates (Provide Latitude/Longitude OR UTM-X/UTM-Y)			
					Latitude	Longitude	UTM-X	UTM-Y
5	5/ PID 213100162100	Fee Title	Wright County	85.99	93° 50' 33"	45° 17' 35"		

**NOTES:** The proposed Phase IV property acquisition includes 85.99 total acres, of which 60.32 are land acres and 25.67 are water acres.



2011 LCCMR Proposal Map

Bertram Chain of Lakes Regional Park

Phase IV

Legend

- Total Acquisition Boundary (1200 Acres) \*
- Phase I - Completed (319 Acres) \*
- Phase II (51.54 Acres) \*
- Phase III (169.32 Acres) \*
- Phase IV (85.99 Acres) \*
- City of Monticello

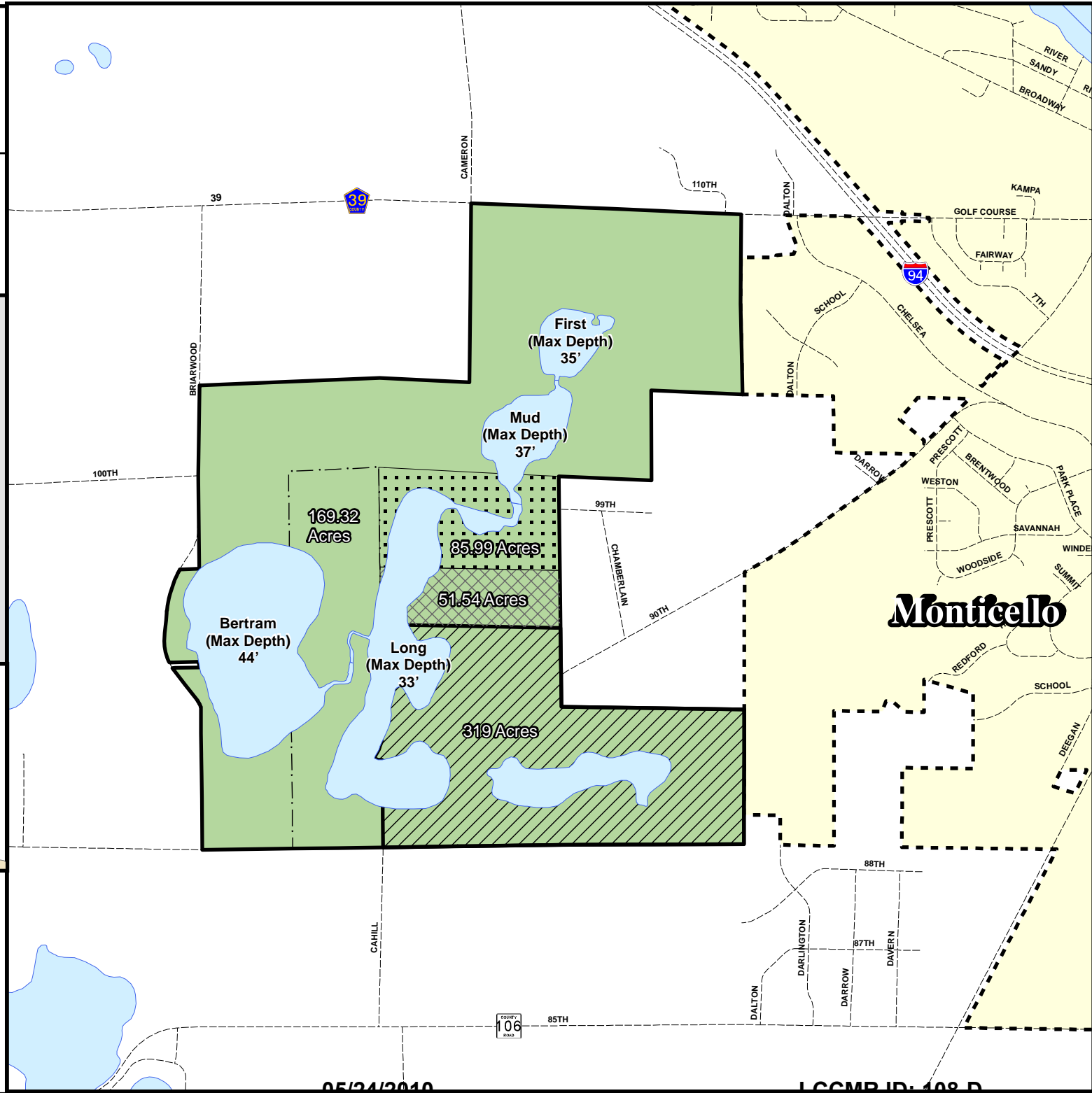
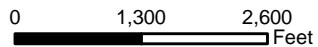
- Roads
- Park Location



\* All acreages include land and water



Wright County GIS  
Office of the County Surveyor  
April, 2010



**Project Manager Qualifications:**

Angela Schumann has worked for the City of Monticello for two years as the Community Development Director. For a number of years prior to becoming Community Development Director, she served the City as Community Development Coordinator. Ms. Schumann is responsible for overseeing the development of the City's long and short term park, trail and open space plans as related to the implementation of the City's overall land use planning efforts. She has also been involved in the planning and development of a wide variety of city infrastructure and facilities. In 2009, Ms. Schumann coordinated the successful completion of Monticello's first Natural Resource Inventory & Assessment. This document serves as a primary tool for the continued incorporation of natural resources within Monticello's planning efforts.

In her capacity as Community Development Director, she has successfully applied for a variety of grants through the Minnesota Department of Natural Resources. Involvement with the grant awards required keeping financial accounts of expenses, labor, and materials, and closing out grants in a timely and organized fashion.

Schumann graduated Magna Cum Laude from St. Cloud State University in 1998 with a Bachelor of Arts Degree in Geography.

