

SWCD CHECKLIST

Conservation Easement Acquisition

Part I

FOR CONTINUOUS, NONCOMPETITIVE SIGN-UPS, SUBMIT ALL ITEMS LISTED IN BOTH THE “APPLICATION PACKAGE” BOX AND THE “AGREEMENT PACKAGE” BOX. SUBMIT AS ONE PACKAGE TO BWSR.

Application Package

____ Application	____ CEFW	____ Wetland Restoration Info form*
____ Aerial Photo(s)	____ Land Use & Soils*	____ Scoresheet*
____ Easement Area Assessment		

*submit when applicable

Application Stage

- 1) Date _____ **Application package completed**
- 2) Date _____ **Local prioritization completed (when instructed to by BWSR)**
 Screening Committee action (optional) _____ SWCD Action _____
 Approved by SWCD _____ Not approved by SWCD _____
 If the SWCD does not approve the application, stop here. Owner notified of the action on _____
(date)
- 3) Date _____ **Mail to BWSR for review and funding approval**
- 4) Date _____ **BWSR notification of funding status**
 Approved by BWSR for funding _____ Not approved by BWSR for funding _____
 If the application is not funded, stop here. Owner notified of the action on _____
(date)

IF APPLICATION APPROVED, PROCEED TO AGREEMENT STAGE BELOW.

Agreement Package

____ Agreement Information Form	____ Shapefile of easement area
____ Copy of the Deed	____ Other documents as specifically requested
____ Copy of Government Lot Maps, Trust, Partnership, and/or Corporation Documents*	____ W-9 for easement payee (not copayees)
	____ Proof of Dept. of Ag Certification*

*submit when applicable

Agreement Stage

- 5) Date _____ **Agreement Package completed (contains all components listed above)**
- 6) Date _____ **Mailed Agreement Package and other pertinent documents to BWSR.**
- 7) Date _____ **Final shapefile received from BWSR and boundary reviewed with landowner**
- 8) Date _____ **Revised CEFW and Land Use & Soils sheet sent to BWSR (if applicable)**
- 9) Date _____ **Agreement documents received from the BWSR central office.**
- 10) Date _____ **Review for correct grantor names (e.g. spelling), payment terms and amounts, etc.**
- 11) Date _____ **Obtain notarized signatures of grantors**
- 12) Date _____ **Signed agreement documents sent to BWSR central office, via certified mail**
- 13) Date _____ **One fully executed agreement document received from BWSR central office.**

(One fully executed agreement document sent directly to landowner by BWSR central office with letter reminding landowner to check with SWCD regarding the need for an updated abstract)

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SWCD CHECKLIST

Conservation Easement Acquisition

Part II

Conservation Plan Package

____ CEPPW (original or amended)
 ____ Conservation Plan map

____ Conservation Practice Plan
 ____ Conservation Plan Signature Page (send with recorded easement)

Easement Stage

- 14) Date _____ **Received updated abstract from the landowner (if applicable)**
- 15) Date _____ **Requested title insurance commitment from title insurance agent**
- 16) Date _____ **Received title insurance commitment (Should be within 14 days of request.)**
- 17) Date _____ **Obtain copies of consents, subordinations and other related documents pertaining to exceptions listed in the title insurance commitment, Schedule B.**
- 18) Date _____ **Conservation Plan package completed and sent to BWSR (contains all components listed above)**
- 19) Date _____ **Title insurance commitment, copies of related documents, and conservation plan package sent to BWSR**
*Note: Title insurance commitment must be sent to BWSR in the same format as originally received. If lender has requested to be listed as a co-payee, and they are not listed as such on the conservation agreement, request written permission from the landowner to add the lender as a co-payee, and forward it to BWSR. **Do not** send originals of consents or other documents that need to be recorded.*
- 20) Date _____ **Received easement with attached legal description and exhibit(s) from BWSR central office.**
- 21) Date _____ **All notarized landowner(s) signatures obtained on easement document and the following completed:**
 _____ Conservation Plan information, including construction and planting/seeding plans, reviewed with the landowner(s) and the principal landowner signed the plan (should be the same date as the signature of the easement).
 _____ IRS Payment Distribution Form for Multiple Grantors completed and signed by the landowner(s).
 _____ Verified that any environmental problems have been resolved.
- 22) Date _____ **Easement, attachments and exhibits recorded by title agent and final title policy requested.**
 (Courthouse search for recent transactions must be completed by title insurance agent prior to recording.)
- 23) Date _____ **Recorded easement and final title insurance policy received.**
- 24) Date _____ **Sent by certified mail to BWSR:**
 _____ Original, recorded easement document
 _____ Original, recorded mortgage consent (if applicable)
 _____ Final title policy
 _____ Conservation Plan Signature page only
- Note: If the landowner is to be released from a federal contract, provide a copy of the recorded easement to the administering agency.*
- 25) Date _____ **Sent landowner a copy of the recorded easement.**
- 26) Date _____ **Notification of Easement payment received from BWSR central office.**