

EEP PPM Section 8.3.2.1.1		Document No.: IMP.PRO.02.01.01	
Procedure Title: Identify and Approach Landowners		Rev. No. 2	Page: 1 of 7
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## 1.0 PURPOSE AND SCOPE

- 1.1 Purpose. The purpose of this procedure is to describe how EEP identifies and approaches landowners for restoration projects.
- 1.2 Scope. This procedure applies to any potential land acquisition for restoration projects.
- 1.3 Participants. This procedure applies to the following personnel:
- Landowners
  - Design and Construction Supervisor (DCS)
  - Project Manager (PM)
  - Implementation Supervisor
  - EEP State Property Office (SPO) Liaison
  - Design Firm(s)
  - Project Review Team (consists of 2 or 3 staff persons, East or West Implementation Supervisor, and Project Manager[s])
  - Partners: Natural Resource Conservation Service (NRCS), Soil and Water Conservation District (SWCD), other agencies working with landowners.

## 2.0 PROCEDURE STEPS

- 2.1 Submit site proposal. A Landowner or Partner submits a site proposal to the EEP Field Supervisor.
- 2.2 Assign Project Manager. The Implementation Supervisor assigns a Project Manager (PM) to follow up on the site proposal.
- 2.3 Identify contacting party. The PM identifies and contacts the appropriate party to contact the Landowner; this may be a Partner agency or EEP.
- 2.4 Contact Landowner. The appropriate Partner agency or EEP staff member contacts the Landowner via telephone or letter. The communication should include EEP's mission and goals, an explanation of easements or options, a request for permission for EEP to visit the site, and an explanation of the purpose of the site visit.
- 2.5 Obtain permission to visit site. Whoever contacts the landowner asks for permission to visit the site. If permission is not given, stop process. If permission is given, continue with step 6.
- 2.6 Conduct site visit and initial assessment. The PM conducts the initial assessment, following procedure IMP.PRO.02.01.02, Conduct Initial Assessment.

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- 2.7 Record findings. The Implementation Supervisor records the site visit information in the Project Tracking Database, including project name and ID number, following procedure IMP.PRO.02.01.04, Site Name Guidance. If the determination is NOT to proceed, stop the process after recording findings.
- 2.8 Develop preliminary cost estimate. The PM develops a preliminary project cost estimate.
- 2.9 Assess project. The Project Review Team assesses the project based on the findings from the site visit, following procedure IMP.PRO.02.01.05, Project Review Team Coordination.
- 2.10 Make determination to proceed. The Project Review Team makes a recommendation to the Implementation Supervisor whether to proceed. If the Implementation Supervisor decides not to proceed, he/she records that information in the Project Tracking Database and stops the process. The PM sends a Rejection Letter to the Landowner. If the determination is to proceed, go to step 11.
- 2.11 Determine whether offer from SPO required. The PM and Field Supervisor determine whether the Landowner requires an offer from SPO at this point. If yes, go to step 12; if no, go to step 13.
- 2.12 Send property information. The PM sends the property information to the Field Supervisor.
- 2.13 Determine if priority acquisition. The Field Supervisor determines if the site is a priority acquisition based on the CU strategy, most current needs, and available staff resources.
- 2.14 Forward request to SPO Liaison. The Field Supervisor forwards the request for a preliminary SPO offer to the EEP SPO Liaison.
- 2.15 Forward request to SPO. The EEP SPO Liaison forwards the request to SPO.
- 2.16 Provide preliminary offer. SPO provides the preliminary offer to the PM.
- 2.17 Determine if conceptual plan required. The PM determines if a conceptual plan is required. If not, go to step 21; otherwise, go to step 18.
- 2.18 Use on-call procedures for conceptual plan. The PM follows the Contracting for Professional Services, CTR.PRO.01.01.01 [reserved] to contract for the conceptual plan.

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- 2.19 Develop conceptual plan. The selected Design Firm develops the conceptual plan.
- 2.20 Send conceptual plan for approval. The Design Firm sends the conceptual plan to the PM and Design and Construction Supervisor for review and approval.
- 2.21 Discuss purchase offer and conceptual plan with Landowner. The PM discusses the purchase offer and conceptual plan with the Landowner via visit or letter.
- 2.22 Make determination. The Landowner decides where he or she is still willing to provide the land. If no, the Implementation Supervisor records this in the Project Tracking Database and the process stops. If yes, the Implementation Supervisor records this in the Project Tracking Database and goes to procedure IMP.PRO.02.02.01 (Restoration Scoping/Contracting Process). If maybe, the Implementation Supervisor records this in the Project Tracking Database and sends a letter to the Landowner with the standing offer.

### 3.0 RESPONSIBILITIES AND AUTHORITIES

The Implementation Supervisor is ultimately responsible for this process and procedure.

**Table 1. Identify and Approach Landowners Responsibilities and Authorities**

Step #	Procedure Step	Landowner	Design and Construction Supervisor	Project Manager	Implementation Supervisor	EEP SPO Liaison	Design Firm(s)	Project Review Team	Partners	SPO
1	Submit site proposal	P							P	
2	Assign Project Manager				P					
3	Identify contacting party			P						
4	Contact Landowner			P					P	
5	Obtain permission to visit site			P					P	
6	Conduct site visit			P						
7	Record findings				P					
8	Develop preliminary cost estimate			P						
9	Assess project							P		
10	Make determination to proceed				P					
11	Determine whether offer from SPO required			P						
12	Send property information			P	S					
13	Determine if priority acquisition				P					
14	Forward request to SPO Liaison				P	S				

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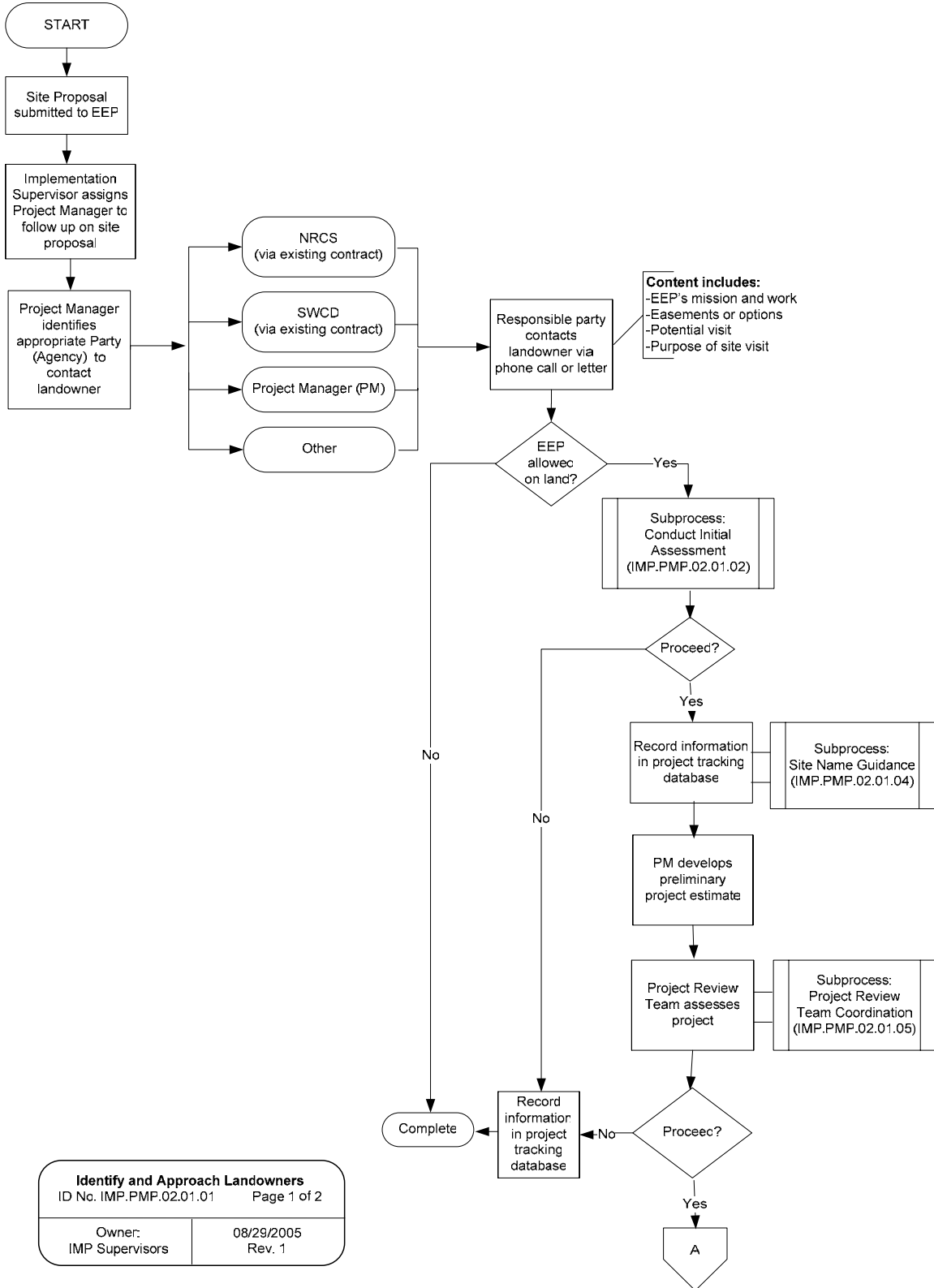
Step #	Procedure Step	Landowner	Design and Construction Supervisor	Project Manager	Implementation Supervisor	EEP SPO Liaison	Design Firm(s)	Project Review Team	Partners	SPO
15	Forward request to SPO					P				S
16	Provide preliminary offer			S						P
17	Determine if conceptual plan required			P						
18	Use on-call procedure for conceptual plan		P		S					
19	Develop conceptual plan						P			
20	Send conceptual plan for approval		RA	RA			P			
21	Discuss purchase offer and conceptual plan with Landowner	N		P						
22	Make determination	P		N						

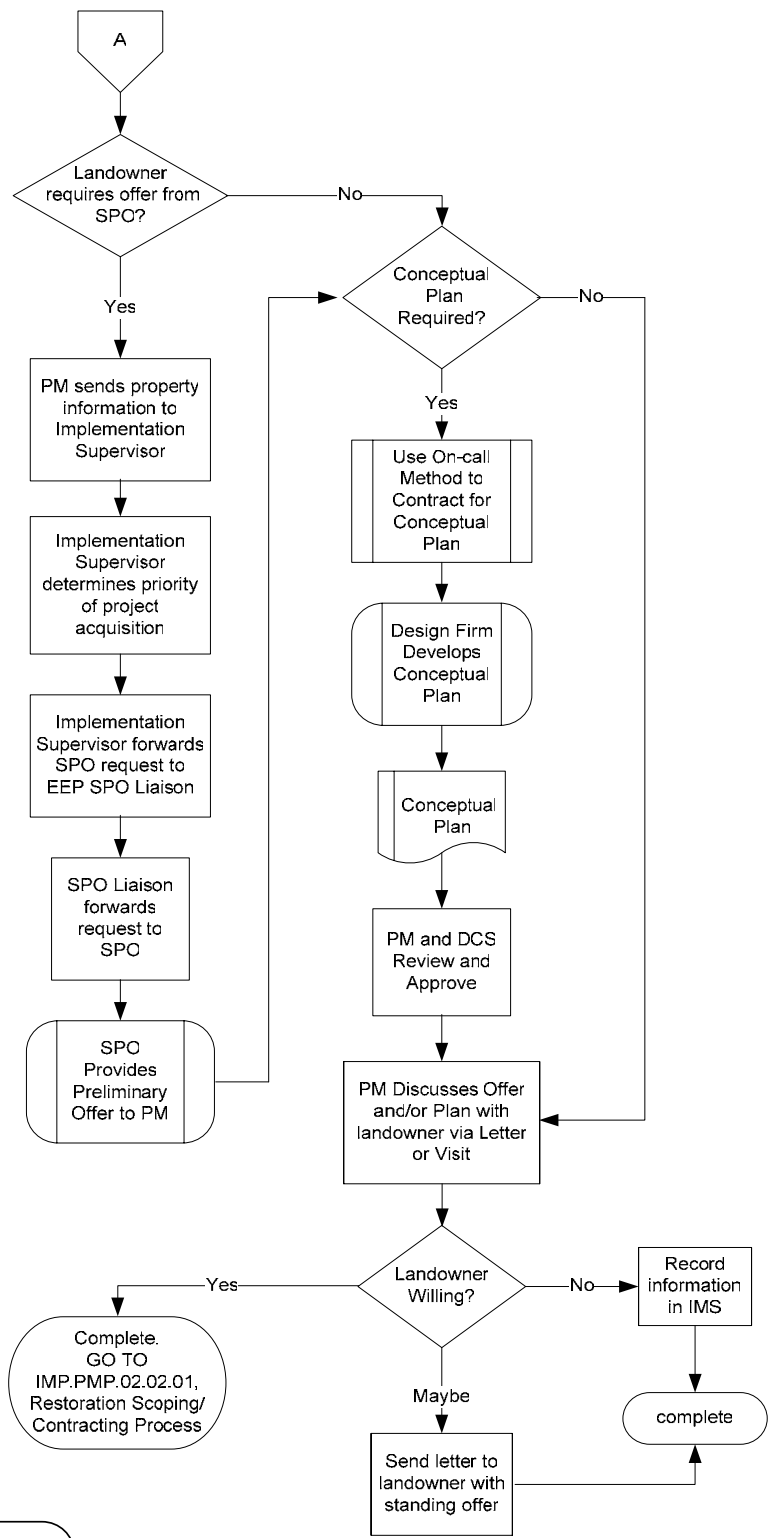
Legend:

- P** = Primary responsibility
- A** = Assist
- RI** = Review to provide Input
- RA** = Review and Approve
- N** = Notify
- S** = Submit final output to this person



### 4.0 PROCEDURE FLOW DIAGRAM





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## 5.0 REFERENCES

Conduct Initial Assessment, IMP.PRO.02.01.02  
 Site Name Guidance, IMP.PRO.02.01.04  
 Project Review Team Coordination, IMP.PRO.02.01.05  
 Restoration Scoping/Contracting Process, IMP.PRO.02.02.01  
 Contracting for Professional Services, CTR.PRO.01.01.01 [reserved]

## 6.0 FORMS

None.