

Attachment A

State Easement Compensation Package Submittal Checklist, Certification, and Geographic Area Rate Cap (GARC) Narrative

State:		ACEP-WRE	EWPP-FPE	Fiscal Year (FY):
		<i>Check the appropriate easement program.</i>		
Checklist of required items submitted and uploaded to PAMS site on (enter date:) _____				
SECTION 1: Method Used to Determine Fair Market Value of the Land				
Areawide Market Analysis (AWMA) (Check only one AWMA option below)				
<input type="checkbox"/>	New AWMA (enter AWMA Report Date): _____ Addresses both programs:			
<input type="checkbox"/>	AWMA Extension of Fiscal Year: _____ (must be previous fiscal year) Addresses both programs:			
USPAP Individual Appraisals (Check only one Individual Appraisal option below)				
<input type="checkbox"/>	USPAP individual appraisals only (Must not check box in AWMA section above; Do not complete Section 2 below, proceed to Section 3)			
<input type="checkbox"/>	USPAP individual appraisals in circumstances where AWMA is not applicable per 440-CPM Part 528.122C. (Must also check one box in AWMA section above.)			
SECTION 2: AWMA Review (If an AWMA option is checked in Section 1 above, complete this Section 2) In this Section 2, check all items that apply				
<input type="checkbox"/>	Land uses described are associated with the program described above. (AWMA specifications requires the market research to include land uses associated with the applicable easement program. If both WRE and FPE are included in the AWMA report, there must be a separate scope of work for each program.)			
<input type="checkbox"/>	Land productivity			
<input type="checkbox"/>	Land unit size			
<input type="checkbox"/>	Soil types and features			
<input type="checkbox"/>	Types and amounts of improvements			
<input type="checkbox"/>	Potential influence of other factors, such as development pressure			
<input type="checkbox"/>	General topography and natural features			
<input type="checkbox"/>	Location			
<input type="checkbox"/>	Irrigation water rights			
Yes	No	AWMA Report Review - Check 'Yes' or 'No' for each question. (If a 'No' answer is entered below, the AWMA report must be corrected prior to submitting the GARC package.)		
<input type="checkbox"/>	<input type="checkbox"/>	1. Report identifies the easement program that is applicable to AWMA values?		
<input type="checkbox"/>	<input type="checkbox"/>	2. Analysis completed by a State-certified general real property appraiser?		
<input type="checkbox"/>	<input type="checkbox"/>	3. AWMA report states that it is completed in accordance with Uniform Standard Professional Appraisal Practices (USPAP)?		
<input type="checkbox"/>	<input type="checkbox"/>	4. Appraiser certification with signature provided in AWMA report?		
<input type="checkbox"/>	<input type="checkbox"/>	5. AWMA report completed in accordance with the specifications provided by NRCS?		
<input type="checkbox"/>	<input type="checkbox"/>	6. Includes at least 10 comparable sales for each land use for each market area that an AWMA value was determined?		
<input type="checkbox"/>	<input type="checkbox"/>	7. Sale dates of comparable sales do not exceed 24 months from the AWMA report date?		
<input type="checkbox"/>	<input type="checkbox"/>	8. If sale dates exceed 24 months, was justification provided and contracting officer approval documented in the AWMA report addendum?		
<input type="checkbox"/>	<input type="checkbox"/>	9. Minimum and maximum acreage range provided for each market area or region? (Only if AWMA specifications required minimum and maximum acreage range. If not required enter 'N/A' in the 'Yes' column.)		

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Yes	No	<i>AWMA Report Review - Check 'Yes' or 'No' for each question. - (Continued)</i> <i>(If a 'No' answer is entered below, the AWMA report must be corrected prior to submitting the GARC package.)</i>
		10. Was each market area adequately described, including social, physical, economic characteristics and market characteristics and influences.
		11. AWMA value for each land use within each market area at or near the average or mean value?
		12. Is the comparable sales data in a spreadsheet format with the required columns? <i>(Required columns include: "name or number for the sale", "county, borough or parish in the market area", "sale date", "total acres", "land use", and "sale price per acre")</i>
SECTION 3: Geographic Area Rate Cap (GARC)		
Identify sources or types of information that were considered in developing the GARCs <i>(Check or list below all that apply and provide supporting documentation for each checked item)</i>		
		Data sets of previously obtained appraisals for the easement program.
		Local real estate market values, tax rates, and assessments.
		Location of the land.
		Soil types and productivity.
		National, State, or local agricultural statistics.
		Local information about the value of land leases for the rights being acquired by the Federal Government.
		Historic values accepted and rejected by landowners for program participation.
		Rates paid by other conservation easement programs that have similar purposes.
		Neighboring geographic areas.
		Additional sources of information used:
SECTION 4: Easement Compensation Package Documents <i>(Check the box identifying each easement compensation package item enclosed and the supporting documents included. Each document must be uploaded as a separate document to the Program Activity Management System (PAMS) with a document file name that identifies the item and the State abbreviation (ST) with Fiscal Year as ##### and easement program WRE or FPE. Any revised documents will include the word "Revised", revision number and YYYYMMDD in file name.)</i>		
If FMV is determined by AWMA:		
		Attachment A, State Easement Compensation Package. <i>(Example file name: ST-FY#####-Program Name-Easement Compensation Package)</i>
		AWMA Report. <i>(Example file name: ST-FY#####-AWMA Report-New or Extension. In the naming convention of the AWMA file please indicate if the AWMA report is new or an extension.)</i>
		Assignment or Engagement letter for AWMA contract. <i>(Example file name: ST-FY####-Program Name-AWMA Engagement Letter)</i>
		Contract award document with AWMA specifications. <i>(Example file name: ST-FY####-AWMA-Program Name-Specs-Award)</i>
		AWMA Sales data in a spreadsheet. <i>(Example file name: ST-FY####-AWMA-Program Name-AWMA-Sales Data)</i>
		GARC Map. <i>(Example file name: ST-FY####-Program Name-GARC Map)</i> The GARC Map should provide the following information:
		Title. <i>(Map title is "Geographic Area Rate Cap (GARC)" and title information should include fiscal year, State name, and applicable easement program).</i>

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SECTION 4: Easement Compensation Package Documents – (Continued)	
If FMV is determined by AWMA: - (Continued)	
	GARC Map. – (Continued)
	AWMA Market Area Boundary. (Include name of market area, and boundaries and name of county, borough or parish)
	GARC Value for each Land Use. (Include land use name and associated GARC value)
	Minimum and Maximum Acreage Range. (May be statewide or by market area or by market area and land use. See AWMA report).
	USPAP Appraisal GARC percentage and no-to-exceed rate per acre. (May be statewide or by market area)
	Spreadsheet with FMV, GARC Percentage, and GARC Value (Use spreadsheet provided by EPD, Attachment B to this National Bulletin.) (Example file name: ST-FY####-Program Name-AWMA & GARC Value & Comparison.)
	Map showing corresponding GARC from adjacent states. (Example file name: ST-FY####-Program Name- GARC Value Comparison Map.)
	GARC Narrative (Use the template provided with this checklist. Narrative is required for either AWMA or Appraisal Only method of determining FMV.)
CERTIFICATION AND SIGNATURES:	
Process and results were reviewed with the State Technical Committee on (enter date): _____ Checklist Completed By: _____	
Signature _____	Date _____
Approved by State Conservationist:	
Signature _____	Date _____

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Geographic Area Rate Cap (GARC) Narrative			
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Guidance: If FMV is determined by AWMA, sections 1-4 must be completed. If GARC values greater than \$5,000 per acre, Section 5 must be completed. If FMV is determined by individual appraisals only, Section 3 must be completed. Section 1 may be applicable if appraisal GARC percentage by region, and if NTE value is greater than \$5,000 per acre, Section 5 must be completed. All other sections enter "Not Applicable."			
Section 1	Geographic Area/Land Uses and Market Area: <i>Describe the market area, development potential, land use, or land productivity categories, and sources of data used to develop the GARCs</i>		

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Section 2 **AWMA and associated GARC Dollar Values:** *(Describe the process, information, and rationale used to determine the GARC values applicable to the associated AWMA's FMVs)*

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Section 3	Appraisal Percentage GARC and Not-to-Exceed Rate: <i>(Describe the rationale and information used to establish the percentage GARC and not-to-exceed (NTE) rate to be applied. If GARC percentage is provided by regions provide justification for the different GARC percentages. In this situation, include a GARC map with appraisal GARC percentages.)</i>		
Section 4	GARC Value Comparison Analysis: <i>Discuss the GARC value comparison by market area and adjoining states. (Subsection addressing GARC values differences that are greater than 20% identifies the market area, land use and GARC values with justification).</i>		

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Section 5	Ecological Importance Justification: For GARC values or individual appraisal NTE rate is greater than \$5,000 per acre , a written evaluation and justification of the ecological importance of enrolling these high-cost lands <i>(If all GARCs and NTE values are below \$5,000, enter "Not Applicable" in the space below.)</i>		