

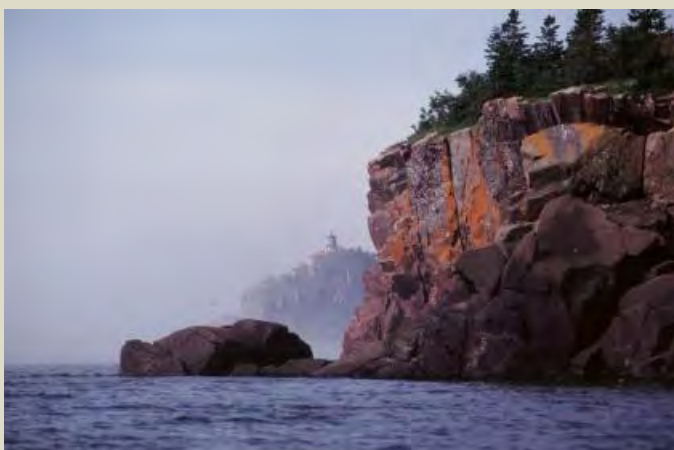
STRATEGIC LAND ACQUISITION PLAN

FOR

PARKS AND TRAILS COUNCIL OF MINNESOTA



DECEMBER 2011



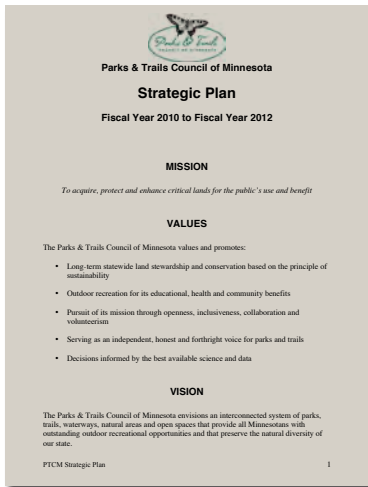
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Introduction and Acknowledgments

Introduction



In September, 2011, Parks & Trails Council of Minnesota (PTCM) retained Schoenbauer Consulting, LLC to work with PTCM's executive director and land acquisition manager in developing a proactive and tactical plan for the organization's land acquisition program.

Key factors influencing PTCM's need to update its approach to land acquisition include:

- **Need for an objective process** – to enable PTCM to proactively define priorities and respond to land acquisition opportunities
- **Desire to operationalize PTCM's 2010-2012 Strategic Plan** – with a particular focus on its mission to broaden support for local and regional groups on a state-wide basis
- **Funding environment has changed** – with Legacy Funds vastly changing funding strategies and opportunities

The goal of the plan is to ensure the use of PTCM's available land acquisition funds and other forms of support/advocacy are well-targeted in promoting the development of an interconnected and integrated network of parks and trails across the state.

Acknowledgments

The consultant team appreciates the opportunity to work with Parks & Trails Council of Minnesota in undertaking an open and constructive process for the project. This approach allowed many perspectives to be considered and acted upon.

The consultant team extends a thank you to the Ad Hoc Committee for participating in the process. Their individual and collective insights were instrumental in drawing conclusions that are reasonable, responsible, and insightful.

The consultant team also extends a heartfelt thank you to the PTCM staff, especially Brett Feldman, Executive Director, and Steve Young, Land Acquisition Consultant. Their guidance and insights on important issues proved invaluable in ensuring that the plan was in alignment with PTCM's Strategic Plan and will prove useful in guiding decisions on land acquisition initiatives and other forms of advocacy.

Sincerely,

Jeff Schoenbauer, RLA / Kathy Schoenbauer, MBA
Schoenbauer Consulting, LLC

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Working with partners to preserve great places is what Parks & Trails Council of Minnesota is all about!



Project Approach and Factors Influencing Outcomes

Project Approach

The project approach centered on the consultant working with PTCM staff and ad-hoc committee of the PTCM board to create a strategic land acquisition plan that includes goals and strategies for the targeted use of available land acquisition funds. The project work plan also sought to define other ways in which PTCM can complement its traditional land acquisition role and become more active in promoting/advocating the development of an interconnected and integrated network of parks and trails across the state, improving research, and supporting new ways to get people interested in the outdoors.

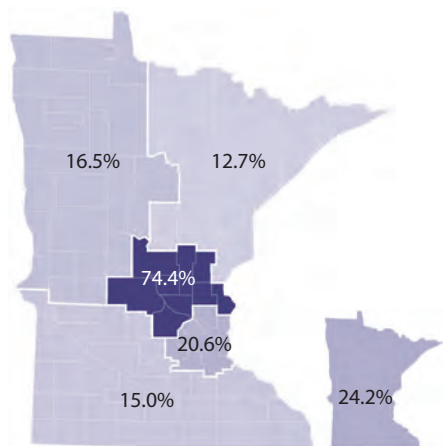
As part of the planning process, the consultant interviewed a variety of stakeholders associated with regional and state-level parks and trails – including representatives from MN DNR, Greater MN Regional Parks and Trails, and Metro-Regional Parks and Trails. Staff at the University of Minnesota were also interviewed to gain their insights on planning issues.

A variety of plans were reviewed to ensure that planning outcomes took into consideration broader planning issues and strategic directions at the state and regional level. These included:

- **Parks & Trails Council of Minnesota 2010 – 2012 Strategic Plan**
- **Parks and Trails Legacy Plan (and Recreation Opportunities Work Group Report)** – 25 year long-range plan for parks and trails of state and regional significance
- **Minnesota State Parks and Trails: Directions for the Future** – MN DNR’s strategic 10 year plan
- **Minnesota’s Network of Parks and Trails: Framework and Summary Inventory** – University of Minnesota Center for Changing Landscape’s work related to inventorying parks and trails of regional and state-wide significance, and framework to guide decisions for acquiring and developing parks and trails across MN
- **Metropolitan Council’s 2030 Regional Park Policy Plan** – strategic plan for metro-area parks and trails
- **Greater Minnesota Park Inventory Regional Park Criteria 2005 Report** – LCMR-funded project to inventory regional parks across Minnesota
- **Memo: Questions for Committee** – Mike Prichard (7/22/11)

Factors Influencing Planning Outcomes

The following considers a variety of factors that influenced planning outcomes and shaped the thinking on where PTCM can best use its resources to promote the development of an interconnected and integrated network of parks and trails across the state that will be of high value to Minnesotans.



Projected change in population – 2005 - 2035. (Source: Minnesota's Network of Parks and Trails: Framework - University of Minnesota.)

State-Wide Population Characteristics

Minnesota's Network of Parks and Trails: Framework (University of Minnesota) extensively considered projected changes in the state's population between 2005 and 2035, with the following key findings:

- Projected average for statewide population growth is 24.2%
- More than half of the state's population is in the Metro Area
- The Central and Metro Regions have a larger percentage of young people (younger than 18) than other parts of the state and a smaller percentage of older (65 or older) people
- The Metro Area has the highest proportion of non-white residents—although most American Indians live in the northern part of the state
- The Central region will see the most significant population change by 2035, followed distantly by the Metro region

The following summarizes the projected population growth statewide and regionally across Minnesota between 2005 and 2035.

Projected Population Growth across Minnesota

Area	Population Change
Statewide	Average population growth projection across the state is 24.2%.
Metro Region	More than half of the state's population lives in the Metro Region, which has a population density eight times that of the state.
Central Region	Predicted to experience the greatest population growth, averaging 74.4% for the counties closest to the Metro Region, substantially higher than the statewide growth. This region will account for 15% of the State's population in 2035, up from 10% in 2005.
Northwest Region	The population is concentrated in the southern half of the region, in the Bemidji Area, and in a few communities in the northwest. Populations in this region's 24 counties are predicted to show both growth and decline. Beltrami (33.6%), Douglas (32.3%), Becker (26.7 %), Cass (25.4 %), and Clay (25.3%) are predicted to grow while Kittson (-25.1%), Traverse (-24.0%) and Wilkin (-6.0.%) are predicted to lose population. The region is predicted to grow by 16.5%.
Northeast Region	The population is concentrated in the Greater Duluth area, in the Brainerd/Baxter area, and on the Iron Range in a line along the Laurentian Divide. Smaller communities are strung along the North Shore. The region's predicted growth average of 12.7%.
South Region	The population is concentrated in Rochester, Mankato, and Willmar areas, and in county seats. The region is predicted to grow by 15.0%. Most of the regional population is in the east, which is expected to grow significantly.

The population growth and characteristics projections and trends are important for a couple of key reasons:

- Minnesota's population will continue to be more and more concentrated in already developed or developing areas
- Minnesota's population will continue to be more and more diverse, bringing with it changes in demands for one type of recreational facility versus that of another



Note: Cited MN DNR reports are available online at <http://www.dnr.state.mn.us/aboutdnr/reports/index.html#parks>

These last two points will greatly influence where park and trail opportunities are best located and what type of recreational facility is most desired to best serve Minnesotans in the future.

Participation Trends – Findings and Other Related Issues

A key factor in making sound resource allocations is basing decisions on reliable information related to trends in participation rates and changes in demand for one type of outdoor recreational opportunity versus another. Review of available research findings proved enlightening, with the following being the most pertinent.

Parks and Trails: A History of Support and Success in Minnesota

Each year, state and regional parks and trails receive tens of millions of visits, with Metro-regional parks and trails alone receiving an estimated 40 million+ visits. Based on 2007 research by MN DNR, satisfaction ratings of Minnesota State Parks visitor experiences are at an all-time high. Although traditional outdoor activities have seen varying degrees of per capita decline in participation, new trends – such as providing “high service” items like park programs that cater to children and the opportunity to rent equipment and attend special events – are increasingly popular with many families and are bringing new populations to parks.

Clearly, Minnesotans across the state value parks and trails and find them important to their quality of life. Voter approval of the Legacy Amendment further reinforces Minnesotans’ general commitment to preserving the natural qualities of the state and having access to quality parks and trails. This history of success provides a sound platform to work from as PTCM considers how to best allocate its resources in ways that will have lasting value to Minnesotans.

Importantly, building upon past successes and furthering the cause for parks and trails in Minnesota also requires an understanding (and recognition) of new challenges and trends associated with the use of parks and trails and participation in outdoor activities. Unfortunately, not all of these are positive. To that end, the following summarizes some of the key trend indicators that cannot be taken lightly if PTCM is to ensure that future investments of time and resources are well-targeted and will add true value to the statewide park and trail system.

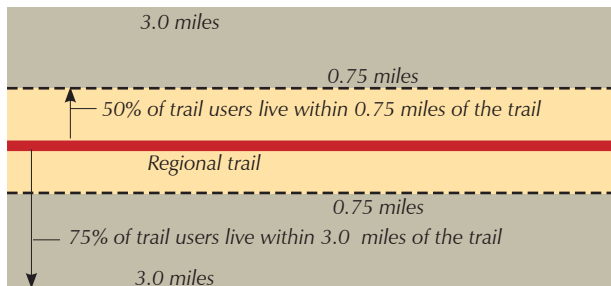
Trail-Related Findings

MN DNR: Status of Summer Trail Use (2007-09) on Five Paved State Bicycle Trails and Trends Since the 1990s – published August 2010

DNR trail-related research provides some interesting and at times discouraging findings, including:

- **Trail-use trends are generally negative** (i.e., declining use levels) – for both state trails and Twin Cities regional trails, with larger declines being realized with tourist trails (e.g., Paul Bunyan, Heartland, and Root River/Harmony-Preston Valley); one reason offered – but hard to measure – for the downward trends is expansion of trail opportunities, resulting in spreading out of trail use among more trails

- **Market area has a large effect on trends in trail use** –with use declines the least (or increases the most) for the local market, and declines the most (or increases the least) for the longer-distance tourist markets
- **Attractiveness and quality of experience of a given trail matters to potential users** – with four values rising to the top : 1) scenic quality, 2) quietness/peacefulness, 3) place for exercise, and 4) being away from motorized vehicles



At least in the Metro area, most trail users live nearby the trail they are using, reinforcing the importance of providing high quality trail experiences “right out the back door!” (Source: Metropolitan Council)

Findings from several other studies paint a similar picture and provide some additional insights. A study by the University of Minnesota had similar findings relative to desired user experience, with top reasons people using trails including viewing scenery, being close to nature, getting away from life demands, being physically active, and discovering new things.

As the graphic illustrates, research findings by the Metropolitan Council reinforces the importance of providing high quality trail opportunities close to population centers.

Park-Related/General Findings

Review of available park-related research findings proved enlightening as well, with the following considering the most pertinent findings.

MN DNR: 2007 Minnesota State Parks Research Summary Report – published October 2008

* The per-capita change figures are the most useful for revealing the underlying popularity of an activity, because they factor out the influence of population growth (or decline) on the change value.

As with trails, DNR park-related research provides some interesting and at times discouraging findings, including:

- **Nature-based recreation participation is down** – since the 1990s, state is exhibiting declining participation on a per-capita basis; decline is broad based and national in scope, and relates to Minnesota State Parks, national parks, and state trails
- **Minnesota’s participation rate decline less negative** – as compared to all the state and national per-capita figures* are negative, the Minnesota figures tend to be less negative, declining at a per-capita basis of 10 to 12 percent
- **Visitation shift to older adults poses longer term concerns** – the age-class changes for Minnesota State Parks from 2001 to 2007 show visitation is shifting away from young adults and their children to older adults; median age of visitors has increased over 4 years, while the background population has increased just 1.4 years; an important implication of the decline in childhood visitation is the effect it may have on later-life visitation and participation

Metropolitan Regional Parks System for 2010 – published April 2011 (<http://www.metrocouncil.org/planning/parks/ParkUseEstimate2010.pdf>)

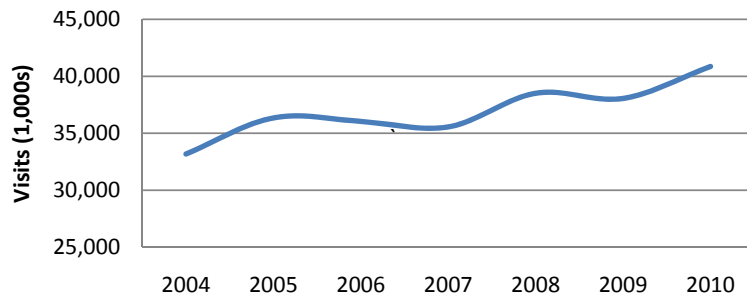
Data from the Metropolitan Council provides a bit more encouraging picture of park visitation in the Metro region, with an estimated 40,867,500 visits being made to the region’s parks in 2010 (an increase of 7.4% from 2009).

The increase in visitation rates can be partially attributed to:

- The increase in popularity of newly opened facilities, such as Silverwood, Big Marine Park Reserve, Dakota Rail Regional Trail and Cedar Lake Farm Regional Park



Total Annual Visits to Metro Regional Parks and Trails: 2004 to 2010



(Source: Metropolitan Council's Annual Use Estimate of the Metropolitan Regional Parks System for 2010)

- Higher than average annual summer counts at facilities including Como Park, Zoo & Conservatory; Mississippi Gorge Regional Park in Minneapolis and Minnehaha Parkway Regional Trail
- The reclassification of regional trails in Ramsey County to identify entrance points that had not been captured in previous counts

Whereas the data related to growth in overall visits within the Metro region is encouraging, that does not necessarily translate into growth in per capita participation rates. Further, the visitation trends data reflects sampling the use of 89 park and trail units in 2010, as compared to 73 units sampled in 2004. As such, it is not a

direct apples to apples comparison over time. If compared directly unit to unit, total annual visits may be less robust than shown, although the extent to which is not fully defined.

Land-Related Influencing Factors

As of 2010, according to the *Minnesota's Network of Parks and Trails: Framework* (University of Minnesota), there are nearly 47,000 acres of land with in-holding status within designated state park boundaries alone. This is a rather daunting number. This forces PTCM to be very strategic in supporting land acquisition initiatives based on disciplined evaluation, with the focus being on acquiring parcels that are of highest quality, most time sensitive, and of clearest value.

On the positive side, land values in 2011 are considerably lower than was the case prior to 2008, which presents a unique opportunity to acquire land at a good value, particularly in the nearer-term.

Associated Pertinent Findings

Review of the various research and existing plans along with extensive discussions with professional staff from the various agencies and organizations brings to light a number of findings that might influence decisions. The following summarizes the most pertinent of these.

Limitations of Current Research

Historically, research has primarily focused on measuring use (e.g., the participation rate associated with a given trail/system of trails), with only limited attempts to define demand (e.g., how many miles of trail are needed to meet local, regional, and state-wide needs). This poses some significant constraints on understanding the true demand for parks and trails across the state, much less trying to pick initiatives to support with a high level of confidence that they will prove to be of lasting value.

For example, as of 2009 there are roughly 1,200 miles of state and regional-level paved trails across the state, with an additional 1,300 or more miles of approved planned trails waiting to be developed. With the DNR's data on trail use in mind, one cannot assume that adding this many more miles of trails will result in higher levels of participation. The same words of caution relate to parks, in which an endless demand for new parks across all regions of the state cannot be assumed.

Grassroots Efforts: Potential and Limitations

On the positive side, grassroots support and advocacy for projects has often proven to be of considerable value in defining gaps in park and trail systems and bringing to attention emerging trends in outdoor recreation that might not otherwise be recognized. Occasionally, these efforts result in new parks or trails that serve an unmet need and bring new enthusiasts to the outdoors.

Conversely, misguided grassroots efforts can skew resource allocations to unproductive outcomes if not backed up by data and properly vetted in terms of viability. In other words, grassroots involvement and advocacy has many benefits, as long as it is coupled with an evaluation process that takes into consideration other criteria to ensure the value of any given initiative is properly vetted.

Completeness and Consistency of State and Regional-Level Park and Trail System Plans

Review of available state and regional park and trail system plans provides a mixed picture in terms of completeness and consistency. On one hand, at the DNR and Metro Region-level, the implementing agencies each have various plans that guide planning, acquisition, and development for their systems. At the Greater MN level, planning for regional-level parks and trails is just emerging and will take time to fully evolve. Whereas the plans that are available do help guide agency-level decisions, there is actually no cohesive state-wide plan for parks, trails, and open space spanning state, regional, and local-level systems. This poses significant constraints on making prudent decisions on the allocation of Legacy Funds and other resources that maximize public value irrespective of the provider – and to avoid duplication of parks, trails, and recreational facilities in any part of the state.

What is most concerning is the lack of a comprehensive understanding of what a “right-sized” system of parks and trails across the state really means – in terms of demand, capacity to fund, and making reasonable decisions on balancing quality/quantity in order to best serve the citizens of Minnesota.



Key Conclusions

The previously defined findings underscores the importance of PTCM taking a very disciplined and strategic approach to land acquisition and other forms of advocacy to maximize confidence that investments of time, resources, and political influence will result in outcomes that are *most* valued by the public, and thus further PTCM's mission. The emphasis here on "most" is important in that over time society (people) tends to pay for what it most values and finds relevant to one's quality of life. Whereas it can be readily agreed that all parks and trails have value at some level, **it is equally clear that changing the trajectory of participation in outdoor activities will require wise investments in qualitative park and trail outcomes** that are convenient and accessible to the population centers of Minnesota.

The importance of "qualitative" outcomes should not be underestimated in that enticing people to routinely engage in outdoor activities is competing against other ways one can spend their free time and money. Whereas this may seem (and is) intuitive, the documented leveling off (at best) or decline (at worst) in per capita participation rates suggests past efforts have not been fully successful. This requires a fundamental rethinking of how park and trail initiatives are prioritized and delivered across the state – with the primary goal being to support projects that will be most valued by Minnesotans.

PTCM is well-positioned to continue its traditional role in the area of land acquisition. This role remains viable and important, especially as the organization reaches out to a broader set of partners across the state than has traditionally been the case.

Whereas the organization's past role remains important, the introduction of Legacy Funds and the changing nature of public financing for parks and trails has and will continue to change the landscape in which PTCM operates. In this environment, it is both prudent and perhaps will become increasingly necessary for PTCM to pursue other forms of advocacy and project involvement to further its cause and be successful in achieving its mission.



At least in the Metro area, most trail users live nearby the trail they are using, reinforcing the importance of providing high quality trail experiences “right out the back door!”



Strategy for Selecting Park and Trail Initiatives to Support

Overview

The forthcoming strategy sets forth a set principles, themes, and criteria to ensure that initiatives supported by PTCM will result in outcomes that Minnesotans and visitors alike will find relevant and valuable. The strategy purposefully sets forth a limited set of criteria to ensure that decisions are made based on factors that matter most in selecting initiatives that will have lasting value, and support PTCM's own mission, values, and vision.

The strategy is consistent with PTCM's 2010-2012 Strategic Plan, which states that PTCM will:

- Take a proactive and strategic approach to acquiring and protecting land for parks and trails
- Emphasize connections among Minnesota's existing state parks and trails and other state, local and regional parks and trails
- Expand its work in support of local and regional groups that advocate for local and regional parks in Greater Minnesota

Strategic Approach Supported by Organizational Growth

The success of PTCM in implementing its strategic plan is contingent upon its strength as an organization and the level of influence that garners, both in terms of economic wherewithal to take on specific initiatives and ability to be an effective advocate in the public arena. At the core of this is maintaining and growing the membership base, not only in terms of raw numbers but also in terms of individual members and organized groups that have standing and influence in the public arena to help PTCM be effective and successful. In this context, the strategic plan presented here fully recognizes the importance of growing the organization as a means to expand its capacity to pursue important initiatives, as the following graphic illustrates.



As illustrated, selecting projects based on merit is essential to being successful – in terms of fostering value-added parks and trails in Minnesota, which in turn brings in new members to support what PTCM is trying to accomplish. This fact cannot be overlooked in establishing the criteria and protocol for selecting projects.

While grassroots and advocacy group support is (to varying degrees) legitimately part of the evaluation process in selecting projects, it also needs to be recognized that an advocacy group may not always be right, irrespective of their level of passion. To that end, the forthcoming strategy both embraces advocacy group involvement while also making sure other criteria are used to ensure objectively and discipline in selecting initiatives to support.

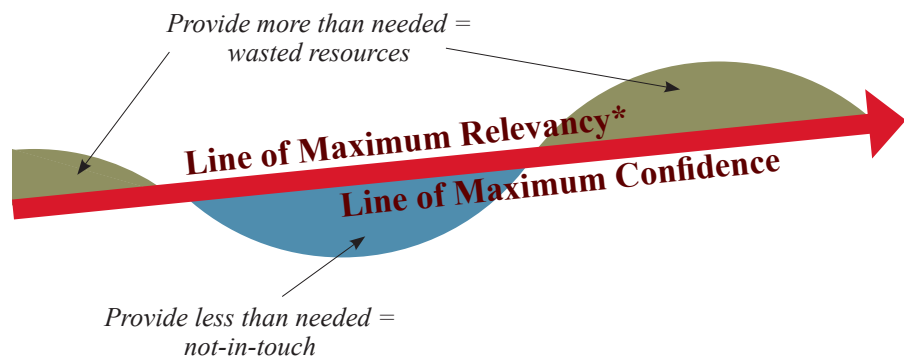
Guiding Principles and Themes

The following sets forth baseline or overarching principles and themes to guide selection of initiatives PTCM will actively support. Although tailored specifically for PTCM's planning purposes, the principles and themes are in broad alignment with those defined in other recently developed plans. Most notable of which are the *Parks and Trails Legacy Plan* and its companion *Recreation Opportunities Work Group Report*.

Underlying all of these is the realization that public resources for park and trail initiatives across the state will be limited, reinforcing the importance of selecting projects of highest merit relative to providing a high value and discernible public good.

Principle/Theme #1 – Support Initiatives Most Relevant to and Valued by the Public

Entails placing a priority on near-home park and trail initiatives in areas that are densely settled, rapidly growing, and/or an *established* regional center. Also includes placing a priority on initiatives that will address emerging recreational needs and/or serve an under-served segment of the population. The underlying goal is to gain confidence that the initiatives that PTCM gets involved in will be in alignment with what people really value, as the following graphic illustrates.



Principle/Theme #2 – Support Initiatives Emphasizing High Quality Outdoor Experiences

Entails placing a priority on initiatives in settings resulting in high quality and memorable experiences that will entice visitors to return time and again. For trails, this relates to placing a priority on “destination” type trails that are located in a safe, convenient, and scenic natural setting. For parks, this relates to providing a high degree of public values related to outdoor recreation, education, health, cultural, scenic, and historic values.

Principle/Theme #3 – Support Initiatives Emphasizing Connectivity

Entails placing a priority on filling gaps in established trail systems and connecting communities, parks and recreation areas, and/or significant destinations.

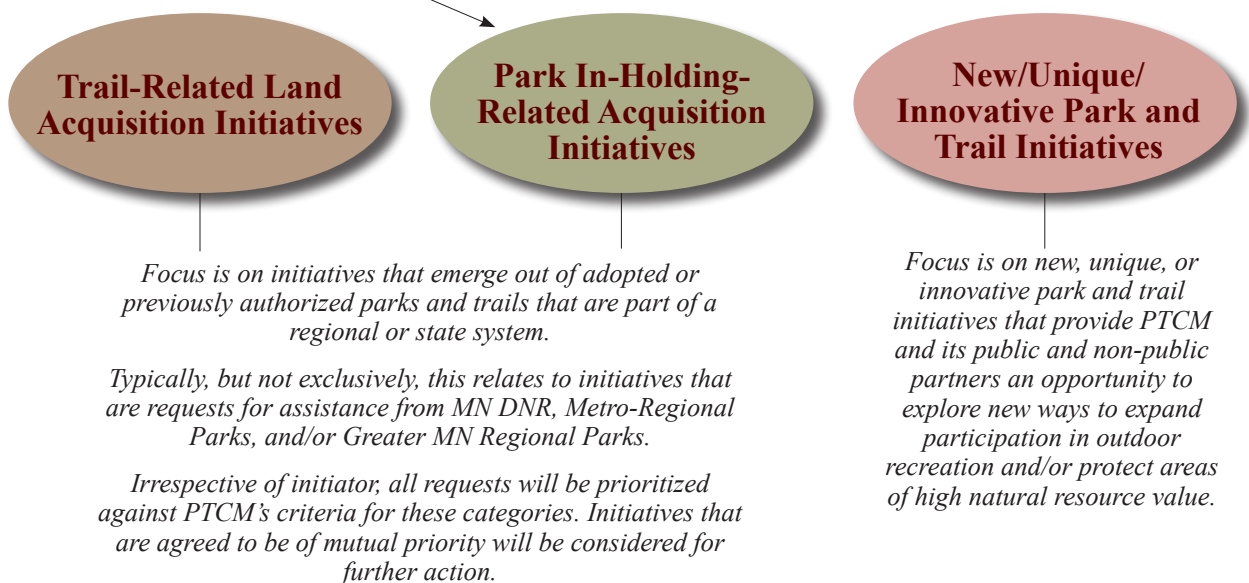
Principle/Theme #4 – Support Initiatives that Protect Threatened/ Exceptional Areas of High Quality Natural Resources

Entails placing a priority on selecting in-holdings, boundary adjustment, and new park areas in which development pressures and/ or high risk of opportunity lost require near-term action to protect a threatened or exceptionally high quality natural area.

Categories and Evaluation Criteria for Park and Trail Initiatives

The following outlines three categories for evaluating and prioritizing potential park and trail initiatives. *Three categories are being used in recognition that the evaluation criteria for each type of initiative is often unique or only pertinent to that circumstance.* The categories and subsequent criteria are broad enough to encompass the predominant factors in decision making, yet limited enough to be manageable and keep the focus on key decision points that are useful in helping PTCM gain consensus and take action on priorities. The following graphic highlights the three park and trail initiatives categories, along with their associated point of focus.

Boundary adjustments are included in this category!



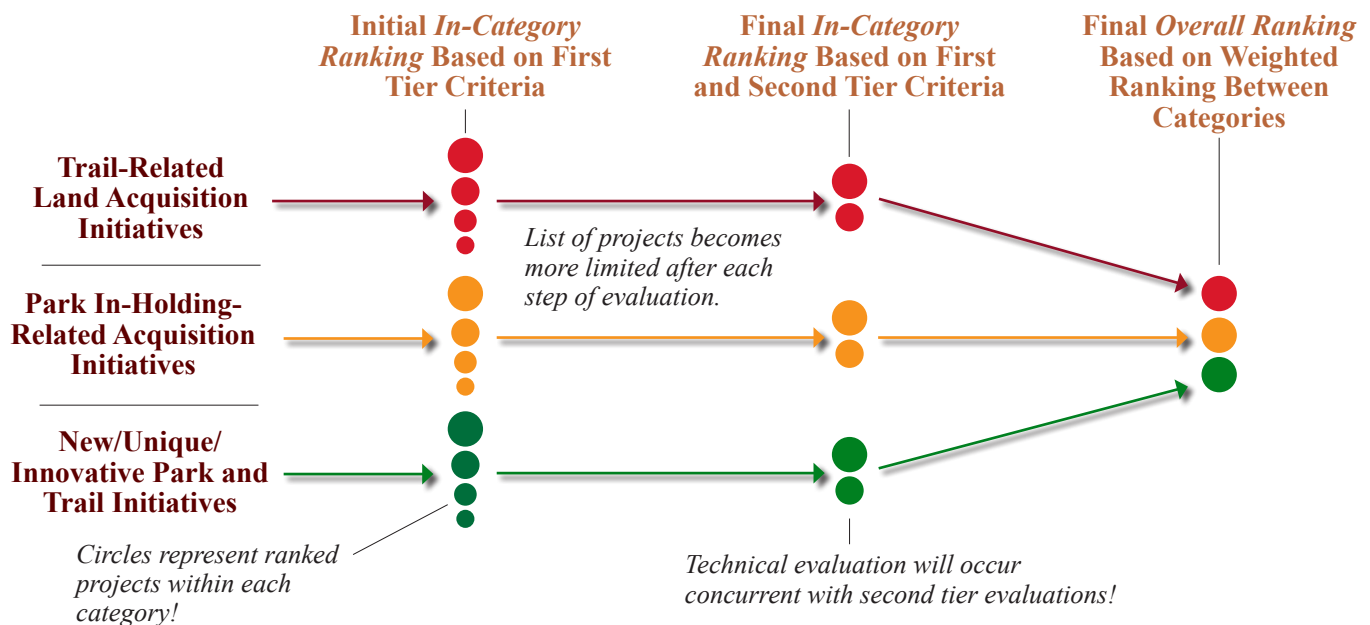
For each of the land use categories, two tiers of evaluation criteria are provided. **First tier criteria focus on establishing the overall merit of an initiative relative to key value indicators.** A weighted scoring approach will be used to determine overall scores and, ultimately, ranking.

Second tier criteria focus on discerning factors related to feasibility, commitment of partners, grassroots support, funding potential, etc. that are required for an initiative to be successful.

Although second tier criteria are non-scored per se, they will influence whether an initiative is a “go/no-go” or “knocked-out” of consideration due to questions about feasibility. Importantly, whereas second tier criteria will factor into deciding the viability of an initiative, first tier criteria are the primary means by which the merit of an initiative will be judged and further considered.

A technical checklist will also be used to further evaluate top priorities, which takes into consideration other factors that may influence project implementability, timing, and so forth.

With both the first and second tier criteria, an evaluation spreadsheet will be used that lists the criteria along with definitions, rating scale, and weighting of one criteria relative to each other. Once priorities are established within each category, weighted comparisons between categories will determine overall priorities that PTCM will support. The following illustrates this process.



Note that the criteria associated with the first two listed categories are purposefully intended to be more objective/pragmatic to keep the focus on projects that established plans and accompanying research data suggests have the highest prospect for success in providing what the public wants where it wants it. Conversely, the criteria associated with the category #3 are purposefully intended to give more flexibility in determining the merit of an initiative based on its potential to meet an unmet need, introduce a new idea, or expand upon growing success.



Focus is on non-motorized trails only! —→

Category #1 – Trail-Related Land Acquisition

The strategy for trail-related land acquisition is to focus on providing high quality trail experiences close to densely settled, rapidly growing, and/or an established regional centers or tourist destination. All trails considered under this category must be part of an adopted or approved state or regional-level trail system plan to ensure an initial level of scrutiny.

First tier criteria establish the overall merit of an initiative using a weighted scoring approach for ranking.

Order of criteria do not necessarily reflect their weight, which PTCM's Board will determine through policy directive. Final weighting will be reflected in the accompanying rating and ranking spreadsheet.

First Tier Evaluation Criteria:

- 1) **Provides a high-quality “destination” trail experience** – features include high quality natural/scenic setting, safe, convenient, and with limited interruptions
- 2) **Well-located** – in or close to a densely settled, rapidly growing, and/or an established regional center or *well-established* tourist destination
- 3) **Enhances connectivity** – with emphasis on completing missing links in established systems, or adding a trail in undeserved areas; sub-criteria includes:
 - Connection to communities (schools, work, business districts)
 - Connection with existing state trails and/or regional trails
 - Connection with parks, recreation facilities and natural resources
 - Connection to multiple destinations
 - Filling a critical gap in an area with a trail-related recreation opportunity shortage
- 4) **Threat of opportunity lost** – with priority given to time-sensitive factors such as development pressure, threat of significantly escalating land values, land owner interest in selling or making a donation, or other discernible threats/opportunities

Second tier criteria are criteria that influence whether an initiative is a “go/no-go” or “knocked-out” of consideration due to questions about feasibility.

Second Tier Evaluation Criteria:

- 1) **Baseline feasibility** – with a focus on the following key factors:
 - Extent to which land owners are willing participants and/or sellers
 - Resources required from PTCM (acquisition and holding costs)
 - Prospects for capital reimbursement and long-term funding – acquisition through development and maintenance
- 2) **Support from grassroots and/or established advocacy group(s)** – primarily used to separate closely scored initiatives, in which having local grassroots support can help move the initiative forward, and foster PTCM's cause
- 3) **Commitment from project partners at agency level** – relates to extent to which an agency can fulfill its role in collaborating with PTCM to move the initiative forward (i.e., commitment of staff time, willingness to commit via formal agreement/letter of interest, etc.)
- 4) **Designated and committed project lead** – relates to extent to which an agency or designated support group can fully commit to and provide an individual responsible to lead the project and/or serve as liaison to PTCM for the duration of the initiative
- 5) **Fund-raising potential** – considers the potential to support the initiative through fund raising activities with project partners

Relative threat allows some flexibility to include initiatives offering high cost-benefit to acquire if it can be reasonably determined that the property falls within a growth corridor and that development pressure will likely increase land values.

Consistency with adopted regional and state-level conservation plans is an inherent part of the evaluation of lands for natural resource/conservation value!

Category #2 – Park In-Holding-Related Land Acquisition

The strategy for park *in-holding*-related land acquisition is to focus involvement on situations where the *relative* threat of opportunity lost is great, with particular emphasis (but not exclusive) on park areas near densely settled, rapidly growing, and/or established regional centers. All parks considered under this category must be part of an adopted or approved state or regional-level system plan to ensure an initial level of scrutiny. Land acquisition initiatives pertaining to boundary adjustments can also be considered as long as the adjustment is ultimately formally included in the adopted plan for the park.

First Tier Evaluation Criteria:

- 1) **Threat of opportunity lost** – with priority given to time-sensitive factors such as development pressure, threat of significantly escalating land values, land owner interest in selling or making a donation, or other discernible immediate threats/opportunities
- 2) **Well-located** – in or close to a densely settled, rapidly growing, and/or an established regional center or *well-established* tourist destination, with an emphasis on meeting local needs
- 3) **Preserves natural diversity and provides natural resource/conservation value** – with emphasis on ecologically rare or important parcels, such as unique landscapes and wildlife habitats, endangered species; emphasizes water quality-related and historically/culturally significant lands: also focuses on connectivity of natural lands and habitats
- 4) **Fills a land gap to improve parkland continuity and/or provide space for high value end-uses** – which pertains to in-holding lands that are important to the continuity of a park and/or enhances connections between existing park units; also relates to lands that provide space for high value outdoor recreation, education, health/wellness, social/cultural end-uses, with an emphasis on under-served locations and/or populations

Second Tier Evaluation Criteria:

- 1) **Baseline feasibility** – with a focus on the following key factors:
 - Extent to which land owners are willing participants and/or sellers
 - Resources required from PTCM (acquisition and holding costs)
 - Prospects for capital reimbursement and long-term funding – acquisition through development and maintenance
- 2) **Support from grassroots and/or established advocacy group(s)** – primarily used to separate closely scored initiatives, in which having local grassroots support can help move the initiative forward, and foster PTCM's cause
- 3) **Commitment from project partners at agency level** – relates to extent to which an agency can fulfill its role in collaborating with PTCM to move the initiative forward (i.e., commitment of staff, willingness to commit via formal agreement/letter of interest, etc.)
- 4) **Designated and committed project lead** – relates to extent to which an agency or designated support group can fully commit to and provide an individual responsible to lead the project and/or serve as liaison to PTCM for the duration of the initiative
- 5) **Fund-raising potential** – considers the potential to support the initiative through fund raising activities with project partners



Category #3 initiatives can relate to land acquisition, or other forms of PTCM support and advocacy!

Category #3 – New/Unique/Innovative Park and Trail-Related Initiatives

The strategy for new, unique, or innovative park and trail initiatives provides PTCM and its public and non-public partners an opportunity to explore new ways to expand participation in outdoor recreation by either building upon a growing success or fostering new or innovative initiatives that support changing trends and fills a *definable* gap in service. Preserving a unique natural resource not otherwise covered under the other two categories can also be considered.

Although initiatives under this category do not necessarily have to be part of an adopted or approved state or regional-level system plan, ultimate support by the affected agency partner will be a significant consideration. Importantly, a high level of evaluation and scrutiny will be necessary to confirm the viability of the proposed initiative and/or recreational use(s) – including working with public agencies (MN DNR, Metro-Parks, University of Minnesota, Explore Minnesota Tourism, etc.) that can add insights to this issue.

First Tier Evaluation Criteria:

Criteria 1a and 1b are and/or along a spectrum, with each project being scored relative to its discernible values!

1a) **Provides a high-quality outdoor recreation experience** – with an emphasis on activities that broaden the appeal of parks and trails to new or expanded user groups/populations; fills a discernible and critical gap in an area with a recreation opportunity shortage; supports a unique opportunity or experience; enhances connectivity; requires a higher level of evaluation and scrutiny to confirm viability of the proposed recreational use(s) and/or ...

Consistency with adopted regional and state-level conservation plans is an inherent part of the evaluation of lands for natural resource/conservation value!

1b) **Preserves natural diversity and provides natural resource/conservation value** – with emphasis on ecologically rare or important parcels, such as unique landscapes and wildlife habitats, endangered species; emphasizes water quality-related and historically/culturally significant lands: also focuses on connectivity of natural lands and habitats

2) **Appropriate size and scale** – with a focus on facilities that are best accommodated at a state or regional park or trail level; requires a higher level of evaluation and scrutiny to confirm that recreational use(s) is compatible with park policy and resource protection

3) **Well-located** – in or close to a densely settled, rapidly growing, and/or an established regional center or *well-established* tourist destination is still preferred; however, in this category, well-located might also relate to a site-specific land resource that is uniquely suited for the proposed recreational end use; new initiatives that enhance connectivity also fall under this criteria

“Support” may also come in the form of a coordinated undertaking with other non-profit organizations/groups (e.g., The Nature Conservancy) in order to best leverage capabilities and resources for a larger public good.

4) **Support from grassroots and/or established advocacy group(s)** – must have evidence of local momentum, advocacy, grassroots support, and “boots on the ground”; must have a defined/designated project leader and/or “friends of” group; also must provide evidence that grassroots effort is supported by local community leaders to enhance prospects for ongoing success; this includes providing an individual responsible to lead the project and/or serve as liaison to PTCM for the duration of the initiative

Protocol For Requesting PTCM Support

Second Tier Evaluation Criteria:

- 1) **Baseline feasibility** – with a focus on the following key factors:
 - Extent to which land owners are willing participants and/or sellers
 - Resources required from PTCM (acquisition and holding costs)
 - Prospects for capital reimbursement and long-term funding – acquisition through development and maintenance
- 2) **Support and commitment from project partners at agency level** – which will likely be gained through active participation in the evaluation process since at least some of these initiatives will be outside established plans
- 3) **Fund-raising potential** – considers the potential to support the initiative through fund raising activities with project partners

The protocol for requesting PTCM support for an initiative relates to the path by which an interested party can seek assistance from PTCM. Although some inherent flexibility is needed to respond to opportunities as they arise, in general requests will follow one of two paths, or protocols, as the following defines.

Agency-Based Requests for Assistance

The first path relates mostly to “agency-based requests” for assistance. This pertains to the more typical land acquisition initiatives, in which the protocol centers on working collaboratively with a partnering agency to determine which of their project priorities PTCM will actively support *after* evaluation using PTCM’s process and criteria.

Importantly, PTCM’s priorities that emerge following this path may not be always fully consistent with its partnering agency. This may result in one or both parties deciding not to pursue the initiative together. *What is important is that PTCM remain consistent so that its partners trust the process and understand PTCM’s core values as future opportunities to work together are considered.*

For requests following this path, the protocol includes:

- **Confirm/reestablish relationships with partnering agencies** – this is critical to building and maintaining trust and a strong working relationship with agency representatives
- **Communicate evaluation process and criteria** – pertains to making it clear how PTCM will evaluate and rank initiatives to determine fit with PTCM’s mission, and to determine relative priority
- **Pursue agreed upon highest ranked initiatives** – that serve the interests of both parties

With agency-based requests, PTCM will undertake a formal initiative review and prioritization process with designated agency representatives each year, as agreed to and consistent with pertinent internal processes or partnering agencies. Importantly, agency-based requests will also allow for consideration of initiatives that emerge during the course of the year as necessary to avoid a missed opportunity.



Grassroots/Established Advocacy Groups/Third Party-Based Requests for Assistance

The second path relates to “grassroots”, established advocacy groups, and other third parties that are requesting assistance from PTCM. Many of these requests are expected to relate to initiatives that fall under category 3, although requests may also pertain to initiatives falling under categories 1 and 2.

The protocol for these initiatives centers around using a *Request for Assistance* approach that gives all parties – local communities, advocacy groups, public agencies in Greater MN, etc. – an equal opportunity to be considered for PTCM support and assistance.

For requests following this path, the protocol includes:

- **Communicate evaluation process and criteria** – pertains to making it clear how PTCM will evaluate and rank initiatives to determine fit with PTCM’s mission, and determine relative priority
- **Develop *Request for Assistance* Process** – which defines procedural requirements and evaluation criteria in detail
- **Solicit *Requests for Assistance*** – through a variety of communications channels
- **Apply criteria and rank initiatives** – to determine fit with PTCM’s mission and rank relative to other initiatives
- **Pursue agreed upon highest ranked initiatives** – that best serves the interests of PTCM

The *Request for Assistance* process will be conducted on an annual basis timed to coincide with internal and external funding cycles. Here too, this path will allow for consideration of initiatives that emerge during the course of the year to avoid a missed opportunity.

Equal Opportunity Irrespective of Path Followed or Parties Involved

Irrespective of which path is followed, or which party seeks assistance, *all requests will be evaluated against the same set of criteria within each category to determine an initiative’s merit and ultimate ranking.* In other words, all parties seeking assistance for an initiative will have an equal opportunity to be evaluated and prioritized based on merit.

To that end, no path for seeking assistance has greater or less weight in the prioritization process. The bottom line is that PTCM intends to use the criteria defined in this document as the basis for selecting the best projects to pursue each year, with no preference being given to one party over that of another.

End of report.

