



# APPLICANT FUNDING MANUAL

## ACQUISITION PROGRAM

### 2024 Program Details, Rating System, & Application Copy

Rev. 1/2024

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Application web forms can be accessed through <https://nclwf.nc.gov/apply> and are available January 16, 2024. Applications must be submitted by midnight on March 1, 2024.

## Grant Funding Overview

**Eligible Applicants** – To receive funds from NCLWF, the applicant must be a state agency; a local government unit; or a nonprofit corporation whose primary purpose is the conservation, preservation, and/or restoration of our state’s cultural, environmental, and natural resources.

**Fund Purposes as described in SL 143B-135.234 (c)** – “Moneys from the Fund under this part shall be used to help finance projects that enhance or restore degraded surface water, including drinking water supplies, and contribute toward a network of riparian buffers and greenways for environmental, educational, and recreational benefits; provide buffers around military bases to protect the military mission; acquire land that represents the ecological diversity of North Carolina; and acquire land that contributes to the development of a balanced State program of historic properties.”

Acquisition Program funds from the NCLWF may be used for the purchase of property in fee simple or perpetual conservation agreements. **Land acquisition projects may include land that:**

- Is within the first 300 feet from the top of the stream bank, or the width of the 100-year floodplain, whichever is greater; and/or
- Contains natural areas, element occurrences, or species of concern as defined by the NC Natural Heritage Program or adjacent buffer land that is critical to the viability of those areas; and/or
- Buffers natural habitat around military installations or military training areas, or is identified for state matching funds toward federal funding initiatives that protect natural habitat around military installations or training areas; and/or
- Is the site where historic or cultural events occurred or the viewshed of such properties.

Acquisition of land or easements outside any of the above areas should be considered with matching funds or be donated as match value to the project.

**Funds from NCLWF are not available nor are matching resources credited for any of the following:**

- Purchase or removal of structures, including dams
- The rehabilitation, repair, restoration, operation, or maintenance of structures, including historic structures
- Design, permitting, or construction of greenway or other trails
- In-kind services related to preparation and/or submission of a NCLWF grant application

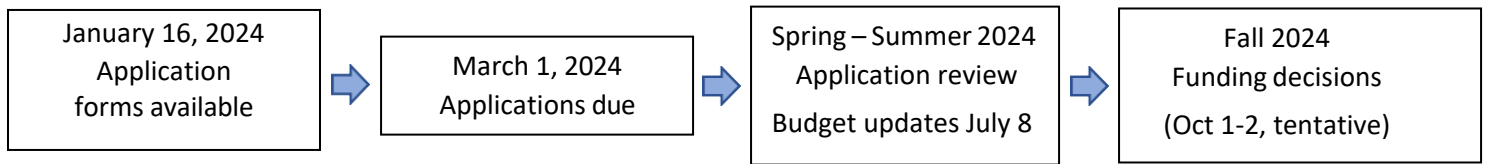
**All project acres must be restricted with permanent conservation agreements to protect natural or cultural resources.**

## Recent Changes

**Transaction Costs** for state agency applicants are no longer capped at \$25,000. All applicants may request reimbursement for all eligible transaction costs to complete the project.

**Baseline Documentation Reports** are required on all projects with conservation easements, determinable conservation easements, and declarations of covenants and restrictions and should be included as request from NCLWF or provided as match in the budget.

## Grant Cycle Timeline



**March 7-22.** Applicants help field representatives schedule site visits. Field representatives will contact applicants to initiate scheduling.

**March 22-June 1.** Applicants and representatives of the eventual owner attend on-site field visit with the field representative who will be your primary point of contact throughout the application review.

**Mid-June.** Virtual project review meetings with the project team will be scheduled if deemed necessary by the field representative. Applicants will work with the field representative during the meeting to provide updates and corrections when requested. **Final updates to match and landowner status due July 8.** Applicants will receive email instructions for this process.

**October 1-2 (tentative).** Funding decision by the NCLWF Board of Trustees. Award meeting date is subject to change.

## General FAQs

### What is required for application?

An eligible applicant must complete and submit an application form, location map, property map, and GIS shapefile of the parcel and conservation agreement boundary (if different). A current letter of intent or purchase option/contract signed by the landowner is **expected at time of application** and is required by the July 8 deadline. Other documents may include additional maps to illustrate the project, a comprehensive land-use plan that identifies the subject property, and a table listing all landowners in a riparian greenway project.

### What is required of the current landowner at the time of application?

NCLWF expects that all projects will be fully discussed with current landowners. For conservation easement-only projects, the NCLWF [conservation easement template](#) should be shared with the landowner in advance to ensure they will accept the state's standard reserved rights and for the landowner to identify additional reserved rights for request. While a purchase option/contract is not required at the time of application, a current letter of intent to sell the fee or conservation easement is expected at time of application. If not possible due to extenuating circumstances, please contact your field representative. Any project without a signed letter of intent or purchase option/contract by the July 8 deadline **will be withdrawn from consideration** for the current grant cycle.

### What is required for a letter of intent?

All letters of intent must be from the current landowner(s), signed, and dated within 12 months of the anticipated award date. This letter is **not** a contract and is intended to be a **non-binding** statement that the landowner has discussed the application with the grant recipient and is willing to consider selling the fee or conservation easement if the grant is awarded. A sample letter of intent is provided in this manual, below.

## **What is required for a purchase option/contract?**

If you have a purchase option/contract, it must be current and not expired, dated, signed, and extend at least through the first quarter of the following calendar year. If your purchase option/contract includes the Tax Identification Number (TIN) or Social Security Number (SSN) of the landowner(s), redact this information prior to submitting. While a purchase option/contract is not required at the time of application, it does have rating system value.

## **Can a landowner upgrade from a letter of intent to a purchase option/contract?**

If, after the March submission date but before the July 8 deadline, your project has upgraded from a letter of intent to a purchase option/contract, you may submit the new document by the July 8 deadline.

## **What is required for an applicant applying on behalf of local or state government or transferring the fee interest to another organization?**

If your organization will be transferring the fee interest to another entity at the end of the project, it is your obligation to include the ultimate landowner in your application planning. This includes ensuring they are willing to take ownership of the land and when and discussing how they intend to use the property and what reserved rights are needed for the conservation agreement. NCLWF expects that a representative from the ultimate landowner entity will be present at the in-person field visit.

## **Who makes funding decisions?**

The nine-member NCLWF Board of Trustees whose members are appointed by the state's Executive and Legislative Branches.

## **How are projects selected for funding?**

Each application is scored and ranked per a rating system developed and adopted by the NCLWF Board of Trustees. The Application Rating System considers value of the resource(s) being protected, the public benefits, the value to the state, and the project's readiness. The Board of Trustees may also consider factors outside the scoring system, such as economic impact, in selecting projects for funding.

## **Are matching funds required?**

No, but match is considered in the Application Rating System and projects with little or no match are rarely funded.

## **How are applications reviewed?**

Review of applications includes a site visit and possibly a virtual review meeting depending on the applicant's needs, both conducted by field representatives. Acquisition Program staff and field representatives review the applications and use the Application Rating System to score each application.

## **Will I have the chance to review an application's score?**

Yes, all applicants will be given the opportunity to review the score for their application(s) in August and will be asked to give feedback on the score at that time.

## **How will I be notified if my application is approved and funded or not approved?**

Following the Board of Trustees' funding meeting, field representatives will contact applicants to relay funding decisions. Applicants will also receive an email from NCLWF verifying the funding decision.

## **How are funds awarded?**

Funds are awarded through the state contracting process.

## **If funded, when can we expect a grant contract?**

Acquisition Program staff will send you a draft contract within three months of the award date.

## **If funded, when can we close on the property?**

Do not set expectations of a closing date nor schedule a closing date with the landowner. It is strongly recommended that you wait until NCLWF has reviewed all closing documents and issued a written approval to close. Closing prior to review and approval may require update and re-recording of legal documents. Average time from submission of draft documents to closing is three months, depending on grant recipient, vendors, and state payment schedules. If you have any questions, consult your field representative.

## **Can we purchase the property before the award date?**

NCLWF encourages all grant applicants to wait until an award date to purchase property but understands in some situations it may be necessary to prevent loss of the property. Please note that doing so may require update and re-recording of legal documents and may change the amount of funds NCLWF can contribute to the project (see Acquisition Budget Lines on page 13). Because of the high risk associated with purchasing property prior to the award date, consult your field representative to discuss the implications as soon as possible.

## **Who should I contact?**

Field representatives are the first line of contact for general questions and for developing projects. Getting your field representative involved early will yield better results for your application and later contract process.

To contact your field representative, please visit our website: <https://nclwf.nc.gov/contact-us>.

## Property Restrictions and Allowed Activities

A permanent conservation agreement must be recorded on all property purchased using NCLWF funds and on property used as match. Agreements must be legally binding, enforceable, and recorded.

Conservation agreements may include conservation easements, declaration of covenants and restrictions, or Articles of Dedication under the Nature Preserves Act. The proposed type of conservation agreement(s) and reserved rights must be included in the application, will be vetted by NCLWF staff, and ultimately approved by the NCLWF Board of Trustees.

Conservation agreement templates are available online and should be shared with the ultimate landowner of the property **prior to application**: <https://NCLWF.nc.gov/stewardship#conservation-agreement-templates>

### Long-Term Obligations

- **Nonprofit Organizations**

After a conservation agreement has been recorded, annual stewardship monitoring is required in perpetuity. For state-held conservation easements, nonprofits enter into a separate monitoring contract with NCLWF and are responsible for annual monitoring, landowner communications, boundary marking, and reporting to the state. Funds for stewardship reimbursement are included in the application budget process and are subsequently set aside in a state-held endowment to be reimbursed annually. Funding for the monitoring of non-state-held conservation agreements is the responsibility of the nonprofit.

- **Local Governments**

After a conservation agreement has been recorded, local governments must comply with the terms of the agreement and any monitoring or reporting requirements set by NCLWF. If recording a state-held conservation agreement, the local government must identify a conservation easement monitor, such as a local land trust, at time of application. The selected monitoring organization must be approved by NCLWF.

- **State Agencies**

State agencies must comply with the terms of the Articles of Dedication.

## Conservation Agreements Applicable to NCLWF-funded Projects

Ultimate Landowner	NCLWF Funded	Match Funded
Private	conservation easement on NCLWF template granted to the grant recipient and immediately assigned to the state <sup>1</sup>	conservation easement held by third party or conservation easement on NCLWF template if preference of landowner and comparable activities; granted to the grant recipient and immediately assigned to the state <sup>1</sup>
Nonprofit	state-held conservation easement through NCLWF <sup>1</sup> or on case-by-case basis, declaration of covenants and restrictions	conservation easement held by third party or state-held conservation easement if preference of landowner and comparable activities <sup>1</sup> or declaration of covenants and restrictions if third party holder of conservation easement is not practicable
Local Government	state-held conservation easement through NCLWF <sup>1</sup> or declaration of covenants and restrictions on local park or greenway	conservation easement held by third party or state-held conservation easement if preference of landowner and comparable activities <sup>1</sup> or declaration of covenants and restrictions on local park or greenway
State of NC	Nature Preserves Act dedication as applicable	Nature Preserves Act dedication as applicable

<sup>1</sup>Qualified organizations may be eligible for NCLWF funds for stewardship monitoring through NCLWF Stewardship Endowment.

## Reserved Rights

All current and proposed uses of the property should be discussed with your field representative. All non-standard reserved right requests are subject to approval by the NCLWF Board of Trustees at the time of funding. Activities must not impair conservation, historic, or cultural values or impede the military mission, as applicable.

### Conservation Agreement Reserved Rights and Restrictions

The following summary of potential reserved rights are here for your convenience. Many items listed below must be specifically requested and discussed with the field representative. Please refer to the conservation agreement templates available online located at: <https://NCLWF.nc.gov/stewardship#conservation-agreement-templates>

**Please note:** Reserved rights considered to be standard in State-held conservation easements or declarations of covenants and restrictions are not necessarily permitted in Articles of Dedication. All reserved rights for properties that will be dedicated under the Nature Preserves Act must be negotiated with the Natural Heritage Program prior to dedication.

Activity	State-held agreement area notes and conditions	Match and upland area notes and conditions
<b>Activities typically allowed in conservation agreements – may be subject to policies or restrictions</b>		
Passive recreation	Includes hiking, walking, scientific study, education, animal/plant observation, nature and environmental education, historic tours, photography	According to holder’s policy
Natural surface trails for hiking	Subject to NCLWF Board Guidelines and Practices for trails; allows boardwalks, ramps, handrails, benches, litter receptacles, trail signs, etc. and may be constructed for universal access	According to holder’s policy (not subject to NCLWF Board Guidelines and Practices for trails)
Paved trails (such as greenway or universal access trails)	Subject to NCLWF Board Guidelines and Practices for trails; boardwalks, ramps, handrails, benches, litter receptacles, trails signs, pedestrian foot bridges, etc. and may be constructed for universal access	According to holder’s policy (not subject to NCLWF Board Guidelines and Practices for trails)
Native community restoration, management, and maintenance	Allows activities to achieve specific goals to maintain or improve conservation values; includes plantings, fire, and other active best management practices. Conversion from one habitat type to a native habitat type requires approval of NCLWF.	According to holder’s policy
Stream and wetland restoration	Allows for stream or wetland restoration subject to all laws and regulations and with approval from NCLWF	According to holder’s policy



Activity	State-held agreement area notes and conditions	Match and upland area notes and conditions
<b>Activities typically allowed in conservation agreements – may be subject to policies or restrictions</b>		
Hunting and fishing	Allows for hunting, fishing, and trapping for recreational and ecological purposes; includes use of temporary stands and hunting leases, and is subject to all laws and regulations	According to holder’s policy
Maintenance of existing roads and trails	Allows gravel replacement, ditch and culvert restoration or replacement; paving or relocation requires NCLWF approval. Existing roads must be documented in baseline documentation report.	According to holder’s policy
Vegetation management	Limited to boundary marking, fencing, signage, fire containment, insect and disease control, hydrology restoration, wetland enhancement, control of invasive exotic plants, removal of trees that pose a threat to life or property	According to holder’s policy
Use of motor vehicles	Limited to purposes of monitoring, management, stewardship, universal access, and emergencies	According to holder’s policy
Income generation and commercial uses	Must follow NCLWF Board Guidelines and Practices for income generation	According to holder’s policy
<b>Activities <u>outside NCLWF priority areas</u> - must be requested in application</b> <i>Priority areas include 100’ riparian buffer, areas necessary for protecting Natural Heritage natural communities or element occurrences, areas necessary for protecting historic sites and viewsheds, and areas determined off-limits due to military operations</i>		
Maintenance of existing early successional habitat	Intended to provide habitat diversity for wildlife; may include native grasses, native forbs, and native herbaceous vegetation; must be documented in baseline documentation report	According to holder’s policy
Maintenance of limited, existing openings	Intended for continuation of passive recreation uses, such as camping; must be documented in baseline documentation report	According to holder’s policy
Group camping site, covered picnic facilities	Limitations on number set by NCLWF	According to holder’s policy
Parking, toilets, educational facilities, small management structures, and passive recreational amenities	Only when other location is not practicable	According to holder’s policy

**Conservation Agreement Reserved Rights and Restrictions Table - Continued**

Activity	State-held agreement area notes and conditions	Match and upland area notes and conditions
<b>Activities <u>limited to specific uses and/or situations</u> - must be requested in application; allowed on a case-by-case basis and must be discussed with your field representative during project development</b>		
Agriculture (crops)/Grazing/Horticulture	Limited to properties protecting military buffers and historic sites where agricultural has historically been practiced; subject to 100' buffer requirements and best management practices	According to holder's policy
Timber management	Limited to NCLWF's working forest easement when matching funds are provided by Forest Legacy Program or when protecting military buffers and historic sites where silviculture has historically been practiced; subject to 100' buffer requirements and best management practices	According to holder's policy
Mountain biking and/or horseback riding	Subject to NCLWF Board Guidelines and Practices for trails	According to holder's policy (not subject to NCLWF Board Guidelines and Practices for trails)
Observation/viewing platforms/docks/camping platforms	Must connect to permitted trails or navigable waterways; allows bench seating, handrails, connecting steps and ramps as required; may be located on the bank of streams subject to all laws and regulations	According to holder's policy
<b>Activities allowed with limitations on match areas only</b>		
Subdivision	<b>Not permitted</b>	Must be limited. Best to subdivide prior to recording restrictions.
Reserved home sites (private residence)		Must be limited and have identified utilities outside of the state-held agreement area. Best to remove home sites from project.
Active recreational amenities		On a case-by-case basis; must be limited

**Conservation Agreement Reserved Rights and Restrictions Table - Continued**

Activity	State-held agreement area notes and conditions	Match and upland area notes and conditions
<b>Activities prohibited in both NCLWF agreement and match agreement areas</b>		
Industrial use	Not permitted	
Confined animal operation		
Mineral use, excavation, dredging		
Conveyance of interests incompatible with the conservation agreement		
Dumping		
Pollution or alteration of wetlands or water quality		
Golf course		
Use as mitigation under 33 USC Section 1344 or NCGS 143-214.11		
Use as compensatory requirements such as open space requirement		

## Acquisition Program Budget Guidance

### Use of Funds and Timing of Expenses

The below chart provides general guidelines on allowable uses of NCLWF Acquisition Program funds.

- The funding or match credit for any item not listed on this chart will be determined solely by NCLWF.
- Award date is the date that NCLWF Board of Trustees approves funding.
- All expenses reimbursed by NCLWF must occur after the award date and be substantiated by invoices.
- All expenses credited for match incurred prior to award date must be requested at time of application.
- Match funds must be for items otherwise eligible for NCLWF funds.
- Details and restrictions follow in the Application Budget Line Items section.

### Allowable Use of Acquisition Program Funds Chart

Item	NCLWF Funds - expenses incurred <i>after</i> award date only	Match Funds - expenses incurred <i>after</i> award date	Match Funds - expenses incurred <i>prior to</i> award date and were requested at time of application
<b>Acquisition</b> - fee simple	Yes	Yes	Yes
<b>Acquisition</b> - conservation agreement	Yes	Yes	No
<b>Transaction Costs</b> required for acquisition	Yes	Yes	Yes
<b>Contract Administration Costs</b>	Yes*	Yes*	No
<b>Property Management Costs</b>	Yes*	Yes*	No
<b>Stewardship Endowment</b> (easement monitoring)	Yes*	Yes*	No
Mitigation or open space spending/activities	No	No	No
Overhead (office rent, telephone, etc.)	No	No	No
Educational signage	No	No	No
Education facilities	No	No	No
Greenway/trail design, permitting, and/or construction	No	No	No
Park improvements and amenities	No	No	No
Removing or replacing an in-stream structure (dam, culvert, etc.)	No	No	No
Removing an out-of-stream structure (buildings, barns, pavement, etc.), or cleaning up debris or dumping	No	No	No

\* Limitations apply to the use of funds for this purpose

## Expenses prior to award date

- NCLWF **will not reimburse funds** for any expense incurred prior to grant award date.
- **Expenses after the award date** and prior to contract effective date - NCLWF will reimburse transaction costs incurred after the grant award notwithstanding the costs may occur prior to the grant contract effective date; however, funds will not be available until after the execution and encumbrance of a NCLWF grant contract. Funds will only be reimbursed if the grant recipient complies with all terms and conditions in the subsequent grant contract.

## Properties acquired before the award date

- If the **fee simple interest in the property is purchased before the NCLWF award date**, NCLWF will only reimburse toward the land interest obtained by the state through the contract:
  - If the organization that purchased the property will continue to own the property, NCLWF will reimburse toward the conservation agreement value.
  - If the property is intended for transfer to the state and a determinable conservation easement is recorded until this transfer can occur, NCLWF will reimburse toward the determinable conservation easement value.
  - If the property will be immediately owned by the state at the end of the contract period, NCLWF will reimburse toward the fee simple value.
- When all or a portion of the property is purchased before the award date, the difference between the fee value and the conservation agreement value may be used as match.

## Application Budget Line Items

### Property/Conservation Acquisition

Appraisals are required for all fee simple and conservation agreement purchases, including property purchased with funds from NCLWF and property value used as match.

- **Appraisal(s)** are not required at time of application to determine the property or conservation agreement acquisition line items and professional judgement may be used for estimation purposes. However, an appraisal will help you in better planning your budget, as appraisals will be required to be submitted to NCLWF if the project is awarded.
- **Number of appraisals** - A minimum of one appraisal is required to determine the fair market value of real property interests being acquired through the project.
  - Exception: When the tax assessed land value (“tax value”) of a real property interest is less than \$100,000, the tax value will be acceptable in lieu of an appraisal. For fee transactions, up to 100% of the tax value may be used as substantiation of value. For conservation agreement-only transactions, up to 80% of the tax value may be used as substantiation of value.
  - A second appraisal is required when the value of a real property interest, irrespective of any bargain sale, exceeds or is expected to exceed \$500,000.
- The **State Property Office (SPO) appraisal review** process will determine a conclusion of property value. This process may or may not require revisions or other appraisals, at the discretion of the SPO.

- **Purchase price maximum** - no funds will be reimbursed for any portion of any purchase for which the purchase price is **in excess of the State Property Office conclusion value**, except as noted below.

Exception: For **greenways and acquisitions by municipalities and counties**, reimbursement for acquisition **may exceed SPO approved property value by up to 10% or \$20,000**, whichever is greater. Any amount over this must be considered by the Board of Trustees. This applies to greenway projects completed by non-profit corporations if it will avoid the use of eminent domain by a local government partner.

- **Condition at closing** - the value used for the budget and all appraisal(s) should reflect the condition of the property at closing and must exclude timber value if it has been contracted, sold, or harvested.

## Transaction Costs

- **Transaction Cost cap** - all applicants may request reimbursement for all eligible transaction costs to complete the project.
- **Eligible Transaction Costs** - up to two appraisals, survey, legal description, boundary marking, Phase I ESA, Baseline Documentation Report, title insurance, legal fees and closing costs, recording fees, and the grant recipient's portion of property taxes
  - Please note that at a minimum for each project, including transaction costs for up to two appraisals, survey, legal description, boundary marking, title insurance, legal fees and closing costs, recording fees, and the grant recipient's portion of the property taxes **are strongly encouraged** as request or match.
  - Baseline Documentation Report expenses are required as request or match for all projects with conservation easements, determinable conservation easements, and declarations of covenants and restrictions.
  - Phase I ESA expenses as request or match should be included if concerns regarding contamination are known at time of application; otherwise, Phase I ESA is optional and at the discretion of the grant applicant. Evidence of contamination, as indicated by Phase I ESA or other means, may require clean-up plans that cannot be included as part of the project budget.

## Contract Administration Costs

- **Eligible Contract Administration Costs** - direct labor cost (salary and fringe benefits for staff and/or contractors) toward progress reporting, reimbursement requests, project scope management, budget management, and project schedule management.
- **Non-eligible Contract Administration Costs** - postage, phone charges, audits, and other overhead expenses are not eligible for reimbursement. Expenses to develop a project or apply for a grant are not eligible for reimbursement or as credit toward match.
- **Contract Administration cap** - conservation nonprofits and local governments may request reimbursement for Contract Administration at an amount up to 10% of the total Transaction Costs (requested and match) of a project, not to exceed \$25,000 per grant.

## Property Management Costs

- **Eligible Property Management Costs** - include money spent **securing a property or protecting resources**. Examples of eligible costs include the following: purchase and installation of gates or other barriers to prevent trespass; management/restriction of access points to areas with conservation values (streams, natural heritage areas, cultural, or historic areas); and immediate stabilization of eroding

streambanks. Other expenses may be deemed eligible by NCLWF pending substantiation of need at time of application.

- **Non-eligible Property Management Costs** - activities prohibited by another NCLWF Guideline and Practice, such as removing debris or structures from the property, are not reimbursable.
- **Eligible recipients** - nonprofit organizations, local governments, and state agencies without a dedicated land acquisition funding mechanism may request Property Management Costs.
- **Permission required at time of award** - expense must be identified in the application and approved by the Board of Trustees, incurred during the contract period, and be substantiated by an invoice from a vendor or signed form attesting to in-kind work.
- **Property Management cap** - request for funds and matching funds may not exceed a combined total of **\$5,000**.

### Monitoring/Stewardship Costs

- **Stewardship requirement** - a stewardship budget request, calculated by the Stewardship Endowment Worksheet, is required for projects that result in a conservation easement held by the state, including properties for which an eventual, but not immediate, transfer to state or federal government is intended. NCLWF Stewardship Endowment funds may only be requested for state-held conservation easements and therefore match easement lands should not be part of the endowment worksheet calculation. See note on Stewardship Matching Funds, below. All requests are subject to adjustment by NCLWF staff to ensure adequate funds.
- **Stewardship budget development** - when the applicant is designating an alternate monitoring organization, the monitoring organization must give input on the budget to ensure their costs are accurately estimated.
- **Staff time prior to visit** - time spent on preparing for the monitoring visit, including contacting the landowner (if applicable) and reviewing the easement, baseline, and previous monitoring reports. Pre-monitoring is capped at two (2) hours.
- **Monitoring** - time spent on the state-held easement property, including landowner discussion (if applicable), documenting the property, and reposting boundary markers as needed. Monitoring should also include the round-trip travel time from the monitoring organization's office. While there is no limit on monitoring hours, the estimate should include only the above activities and reflect the amount of time required to monitor a property respective to its size, ease of access, length of boundary, uses and reserved rights, etc.
- **Staff time post-visit** - time required to complete the monitoring report, process photos and GPS data, and submit documentation to NCLWF. Post-visit monitoring is capped at three (3) hours.
- **Post-monitoring activities** - time required to assist in addressing violations on state-held conservation easements when the property owned by a third-party landowner.
- **Travel cost** - round-trip mileage the monitor must travel to visit the property. For current grant cycle applications, NCLWF has set the rate at \$0.60/mile for planning purposes, but annual expenses will be reimbursed based on the current IRS mileage rate.
- **Supplies for boundary marking** - estimate for tape, paint, and signage for as-needed annual boundary reposting. This should not include expenses for entire property boundary remarking efforts, requests for which will be handled after closing through a separate management fund award process.

- **Other monitoring expenses** - use on an as-needed basis, listing the cost and description of the items proposed. Allowable expenses include supplies for pre-visit mailings, neighboring landowner mailings, follow-up title work, and similar expenses, subject to NCLWF staff approval.

## Matching Funds

NCLWF does not have a minimum match requirement. However, the percentage of match and the type of match are factored in the Application Rating System. Matching funds committed in the application budget must be documented and represent costs that are critical to completion of the project.

The percentage of NCLWF funds and matching funds in a contract must remain the same throughout the project. If the overall project cost is reduced, NCLWF funds and matching resource funds will both be reduced.

- **Qualified Matching Funds** - Matching Funds can only be considered if the costs are directly pursuant to the award and would be considered allowable match if incurred after the grant award date. Such contributions must be verifiable from grant recipient's records and must be necessary for the completion of the project objectives. Matching Funds must be for items eligible for NCLWF funds. For example, overhead may not be counted as matching funds.
- **Ineligible Matching Funds** - NCLWF grant awards may not be used as Matching Funds for other NCLWF grant awards. Funds used as match on prior NCLWF grant awards may not be used as match on other NCLWF grant awards.
- **Expenditure rate of Matching Funds** - Matching Funds should be expended at the same rate as NCLWF funds and in proportion to the original funding commitment by NCLWF. NCLWF will also expect that, upon completion of the grant project, that the original funding ratio of NCLWF funds to matching funds be maintained. For example, if a grant award is approved with NCLWF providing 50% of the total budgeted project cost, then at the end of the grant period, NCLWF expects to contribute up to the 50% cost and only up to the grant award amount.
- **Expenditure timing** - NCLWF grant funds and matching funds should be incurred within the same time frame. However, the Board of Trustees may consider approving credit for matching funds contributions for costs incurred with Matching Funds prior to the grant award date if specifically requested by applicant at time of application and approved by the Board of Trustees.
- **Stewardship Matching Funds** - applicants that will own match land protected by conservation agreement or hold a match easement may receive credit for stewardship funds set aside for their long-term obligations of monitoring and enforcement, provided there is documentation of the transfer of the funds to an endowment account prior to release of funds from NCLWF.



## Resource Significance Sources and Information

The following gives references for data sources used as part of the Application Rating System; more details can be found in the Application Rating System section of this manual.

Much, but not all data, can be found on the NCLWF Application Mapping Tool, located at:

<https://experience.arcgis.com/experience/2402d809f69e488f90cf91aed2198b04>

If you choose to reference other data hosted by ArcGIS Online, look for the 'Authenticated' checkmark and/or most recently updated layers from the agency that owns/manages the original data. NC OneMap (<https://www.nconemap.gov/>) also hosts agency data but is not guaranteed to be the most recent version.

### Waterbody Classifications

NCLWF uses data provided by Division of Water Resources (DWR) and other state agencies to assign points to waterbody classifications in the Application Rating System.

Waterbody ratings are assigned points using data that is available at the time of application, with the exception of wild trout which may include additional surveys by NCWRC during the application review period.

- For DWR classifications including Water Supply, 303d, ORW, HQW, NSW, and B, you can find data here: [DWR Waterbody Classification App](#)
- Classifications can also be found on the NCLWF Application Mapping Tool

Data not hosted for public use is provided directly by appropriate state agencies.

- Wild Trout data is determined by NCWRC

### Natural Heritage Classifications

Natural Heritage data can be found on the Natural Heritage Data Explorer: <https://ncnhde.natureserve.org/>

### NC State Historic Preservation Office (HPO) Data

- Historic data can be found on the HPO Web Mapper (please note archaeological data is not provided): <https://nc.maps.arcgis.com/home/item.html?id=79ea671ebdcc45639f0860257d5f5ed7>
- HPO data can also be found on the Natural Heritage Data Explorer

### SLEUTH Model

- SLEUTH Model data can be downloaded from: <https://databasin.org/datasets/e5860ced8b4844e88431cdebef425e1a/>

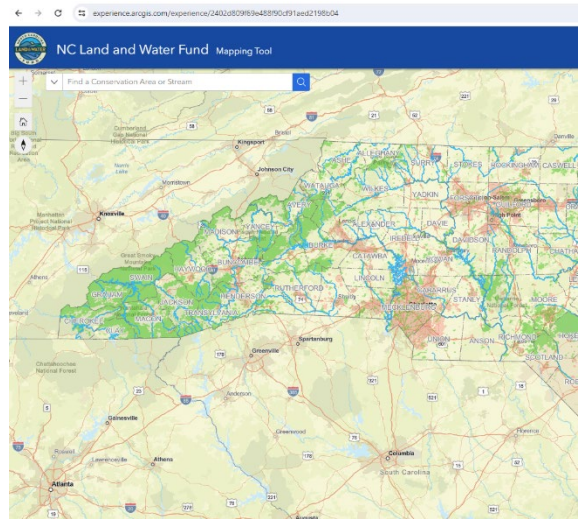
# Application Map Guidelines

The following mapping guidelines are **STRONGLY RECOMMENDED**.

Following these guidelines will greatly help our staff and trustees understand your proposal and the 100-200 applications that are reviewed each year. **Please remember:**

- Only georeferenced PDF, no JPG, PNG, TIF, etc.
- Landscape orientation
- **If you do not have access to GIS software**, please use the [Application Mapping Tool](#) (directions [here](#)) or contact your field representative for assistance.

## [Application Mapping Tool](#)



Your application should contain the following maps, listed below and then detailed by map.

1. Location map - required
2. Property map(s) with aerial photo as background – required
3. Existing improvements/rights-of-way map – required if such improvements are present
4. Additional property maps as necessary to best illustrate project – optional

**1) Location Map.** Show the location of the property in context of major streams, major roads, nearby protected property, nearby municipalities, etc. This map should orient the viewer to the location of the property on a county or regional scale.

Background: no specific requirement but should be a neutral color

Major Streams: **Blue**

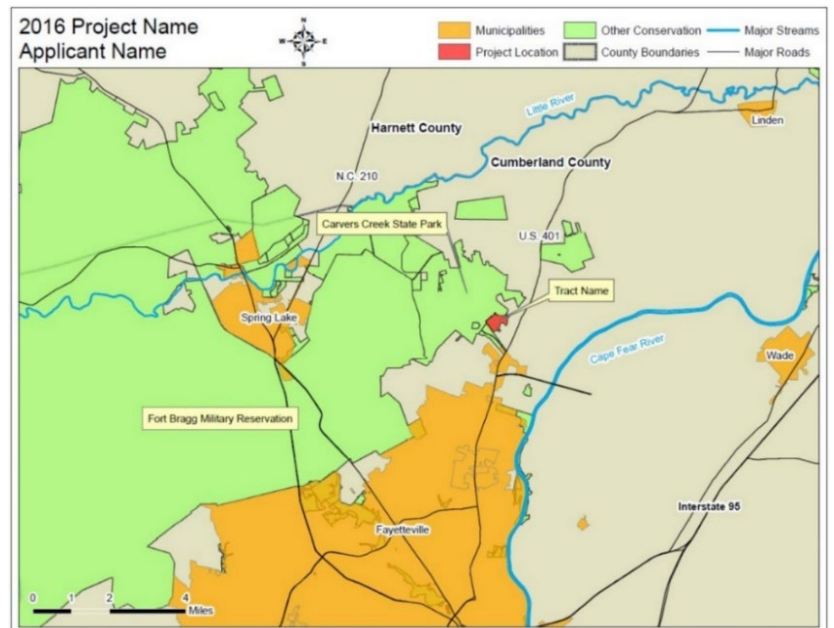
Municipalities: **Orange**

Project: **Red**

Other Conservation: **Green**

Major Roads: **Black**, or standard DOT color codes using ArcGIS online hosted layers.

Labels: Major streams, major roads, municipalities, and county boundaries should be clearly labeled. Any significant landmarks or other conservation lands should be labeled as well.



Location Map example

2) **Property Map(s).** Show details of the project including clear parcel boundaries, legal access to the property, roads, all streams and/or wetlands on the property, the riparian buffer or 100-year floodplain, and the proposed conservation agreement area(s) (if applicable).

Background: A recent **airial image**; if an aerial photo is not possible, please use a neutral color

NCLWF Protected Area Boundary: **Red** outline, no shading or hatching

Match Boundary (if applicable): **Yellow** outline

Other Conservation: **Green** outline

Roads: **Black**, or standard DOT color codes using ArcGIS online hosted layers

Streams: **Blue**

300' Stream Buffer: **Dashed blue**

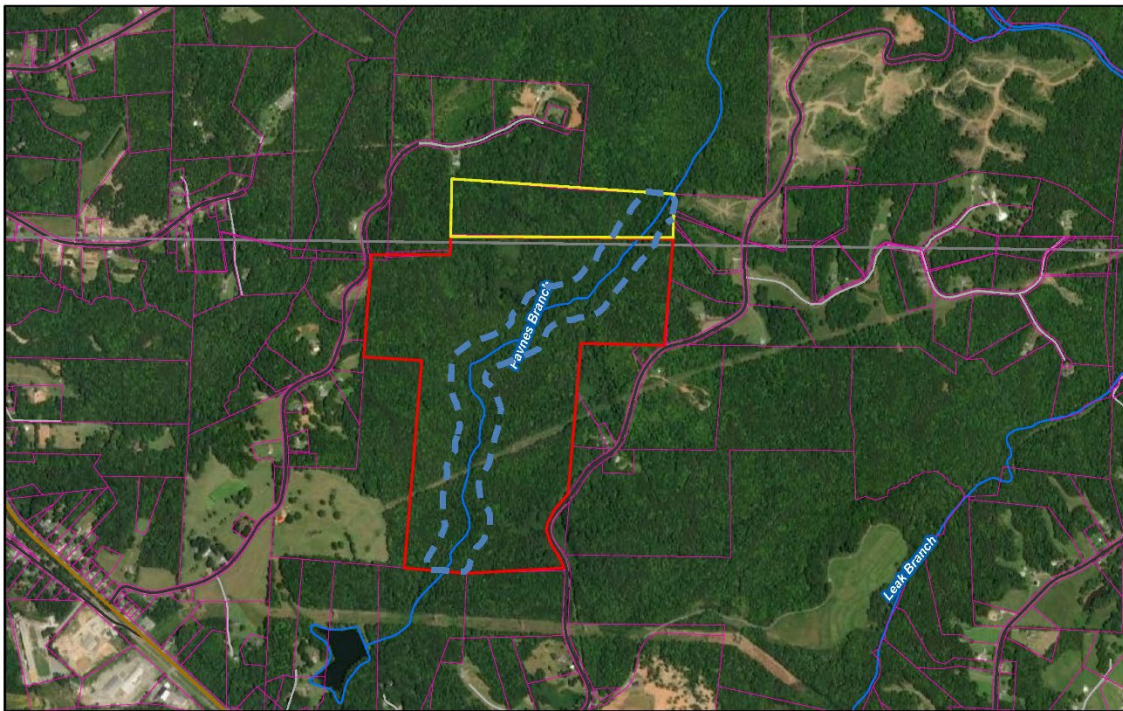
Labels: Named streams, roads, adjacent conservation lands, and landmarks should be labeled

Excluded areas: Should be clearly hatched/shaded and labeled

Scale Bar: Please use scale/divisions that are easily applied to the project

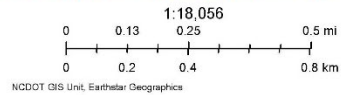
**Property Map Example 1 – NCLWF + Match Easement**

2023 Project Name/ Applicant Name



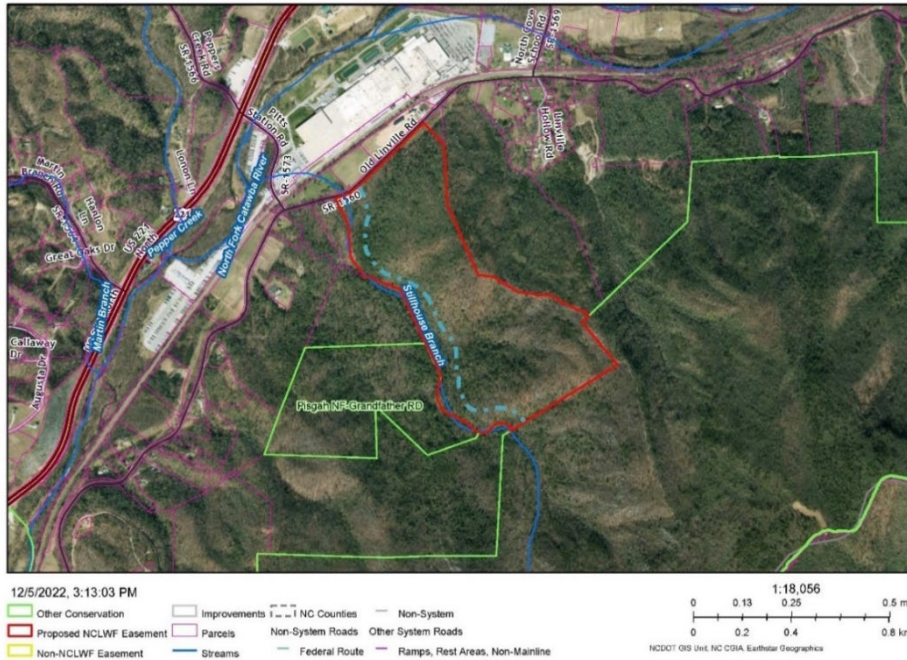
12/5/2022, 2:20:27 PM

- Proposed NCLWF Easement
- Parcels
- Non-System Roads
- Other System Roads
- Non-NCLWF Easement
- Streams
- Federal Route
- Ramps, Rest Areas, Non-Mainline
- Improvements
- NC Counties
- Non-System
- Projected Route



**Property Map Example 2 – Entire Parcel Subject to Protection/Dedication Review**

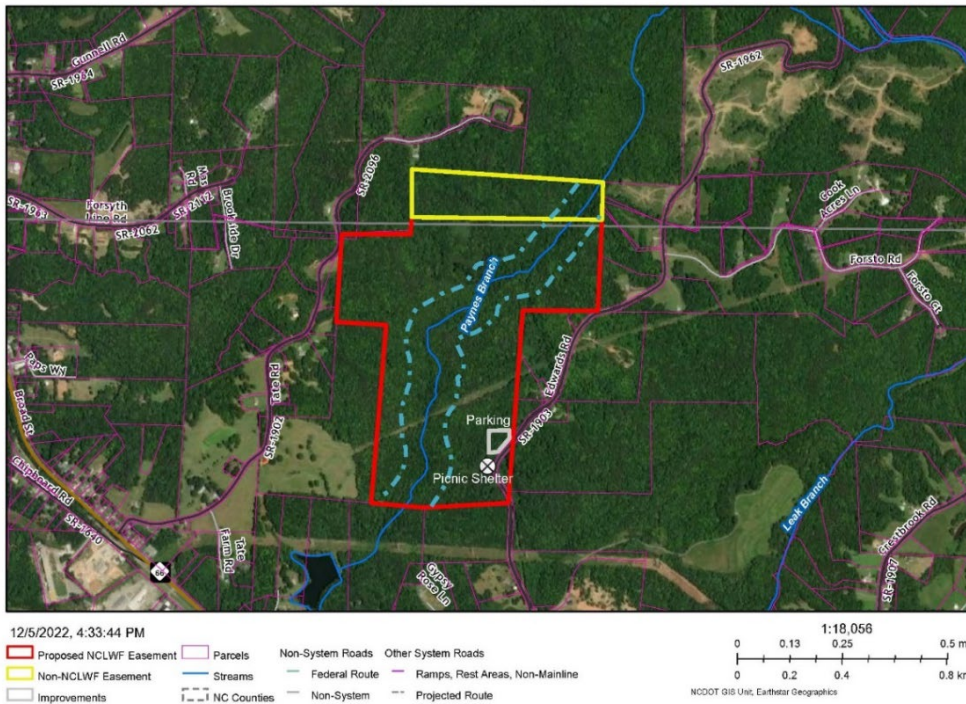
2023 Project Name/ Applicant Name



3) **Improvements Map.** Using the same guidelines for the Property Map, add approximate footprints for existing or planned improvements, existing or planned utilities, easements, activities, etc. and label.

**Improvements Map Example**

2023 Project Name/ Applicant Name



# Sample Template - Letter of Intent

Minimum standard for LOI requirement; edit accordingly or use your own template

## LETTER OF INTENT TO SELL PROPERTY INTEREST

Date:

Name  
Address  
City, State, Zip

RE: NC Land and Water Fund [year] grant application

**PICK ONE:**

***-FEE***

[I am] / [We are] the owner(s) of [acres] acres of land in [County] County and understand and acknowledge that [grant applicant] has submitted a grant application to NC Land and Water Fund for the purchase of the [aforementioned land / approximately [acres to purchase] acres of the aforementioned land].

***-CONSERVATION AGREEMENT***

[I am] / [We are] the owner(s) of [acres] acres of land in [County] County and understand and acknowledge that [grant applicant] has submitted a grant application to NC Land and Water Fund for the purchase of a conservation agreement on the [aforementioned land / approximately [acres to purchase] acres of the aforementioned land]. [I/we] have been provided the opportunity to review the NC Land and Water Fund conservation agreement template.

[OPTIONAL: insert any conditions/contingencies parties have agreed on]

This is a non-binding letter of intent that does not obligate [me/us] to sell the property.

Sincerely,

\_\_\_\_\_  
Property Owner

\_\_\_\_\_  
Date

\_\_\_\_\_  
Property Owner

\_\_\_\_\_  
Date

## Application Rating System - Acquisition

General Statute 143B-135(c) states that the fund may develop guidelines in addition to the minimum criteria for awarding grants. To assist with the allocation of grant funds, the following rating system was approved by the full NCLWF Board of Trustees at its meeting on February 10, 2014, revised September 16, 2014, revised June 5, 2018, and revised December 5, 2019.

### Rating System Overview

The major components of the rating system and percentages are listed below.

#### Resource Significance (58%)

- A. Primary Resource Benefits (50%)
  - 1. Riparian Buffers
  - 2. Riparian Greenways
  - 3. Natural Heritage
  - 4. Historic and Cultural
- B. Additional Resource Benefits (8%)

#### Military Buffers (5%)

- A. Priority to Installations

#### Other Public Benefits (7%)

- A. Recreational Uses / Open to Public Use (5%)
- B. Public or Scientific Education (2%)

#### Readiness and Need (10%)

- A. Landowner Interest (2%)
- B. Funding Status (3%)
- C. Included in a Comprehensive, Long-term Plan (3%)
- D. Likelihood of Land-use Change and Development (2%)

#### Value (20%)

- A. Matching Resources

## Rating System Details

### Resource Significance (58 points)

**A. Primary Resource Benefits (maximum 50 points).** This section is divided into four categories: Riparian Buffers, Riparian Greenways, Natural Heritage, and Historic and Cultural. Though not required, Applicants are encouraged to consider their projects comprehensively and complete questions for all four categories. Only the highest scoring of the four categories below will receive points in this section. Credit accrued from the other three categories will be given in the next section: “Additional Resource Benefits.”

#### 1. Riparian Buffers – Projects that protect land along surface waters.

To receive points, property must border the stream with the classification or be within 1 mile upstream, except where noted below. Unnamed tributaries will be assigned the classification of the nearest downstream classified stream segment. Classifications are determined by the NC Division of Water Resources unless otherwise noted.

##### a. Waterbody Classification (maximum 40 points)

Points in this subsection will be awarded based on the highest level for which the project qualifies.

##### 40 Points

- Outstanding Resource Waters (ORW) classification, or eligible for ORW classification
- Impaired waters on the 303(d) list
- Classified shellfishing SA approved for harvest by the Division of Environmental Health

##### 35 Points

- High Quality Waters classification (HQW) – does not include HQW “by definition” such as SA waters
- Wild trout as determined by the NC Wildlife Resources Commission
- Excellent bioclassification
- Water Supply I classification
- Water Supply II classification
- Water Supply Critical Area

##### 30 Points

- Classified shellfishing SA conditionally approved for harvest by the Division of Environmental Health
- Streams supporting species listed as Federally Threatened or Endangered by US Fish and Wildlife Service
- Primary Nursery Areas identified by the Division of Marine Fisheries
- Inland Primary Nursery Areas identified by the NC Wildlife Resources Commission
- Water Supply III classification
- Water Supply IV classification

##### 25 Points

- Nutrient Sensitive Waters classification
- Unique wetland
- Exceptional wetland determined by the Division of Coastal Management

- Surface Drinking Water Assessment Area Susceptibility Rating of “Higher” –  
NOTE: do not extend 1 mile downstream
- Water Supply V classification

**20 Points**

- B stream classification
- Surface Drinking Water Assessment Area Susceptibility Rating of “Moderate” –  
NOTE: do not extend 1 mile downstream

**15 Points**

- All other streams not explicitly identified above

**b. Integrated Ecological Networks – Riparian Buffer (maximum 10 points)**

**10 points**

- Borders property with permanently protected stream buffers (easement agreement in place specifically protecting riparian buffer)  
OR
- Buffers more than 8 miles of stream – NOTE: count both sides of stream for buffer distance

**8 points**

- Borders property with deed restrictions and management practices in place to protect stream buffers

OR

- Buffers more than 6 miles and up to 8 miles of stream – NOTE: count both sides of stream for buffer distance

**6 points**

- Within 1 mile of property with permanently protected stream buffers (easement agreement in place specifically protecting riparian buffer)  
OR
- Buffers more than 4 miles and up to 6 miles of streams – NOTE: count both sides of stream for buffer distance

**4 points**

- Within 1 mile of property with deed restrictions and management practices in place to protect stream buffers

OR

- Buffers more than 2 miles and up to 4 miles of streams – NOTE: count both sides of stream for buffer distance

**2 points**

- Buffers 1-2 miles of streams but is greater than 1 mile from property with conservation agreements or deed restrictions in place to protect stream buffers –  
NOTE: count both sides of stream for buffer distance

**0 points**

- Greater than 1 mile from property with conservation agreements or deed restrictions in place to protect stream buffers and protects less than 1 mile of stream



**2. Riparian Greenways** – Projects that establish a network of riparian greenways for environmental, educational, and recreational uses.

To receive riparian greenways points, parcels must buffer (border) a stream. Greenways are typically in an urban setting, and they must be vegetated, point-to-point, and incorporate a footpath. Trails may include other uses such as biking and horseback riding. Greenways may be paved or unpaved.

The greenway must be part of a comprehensive greenway plan adopted by an organization that is responsible for developing the greenway. The total length of the greenway system must be at least one mile. The parcels subject to an application must be identified in the adopted greenway plan. The plan must be adopted prior to the grant application deadline.

**a. Percent Impervious Surface in Riparian Buffer (maximum**

**10 points**) Impervious surface area includes unpaved trails.

**10 points**

- Less than 3% impervious surface

**8 points**

- 3% to 5% impervious surface

**5 points**

- Greater than 5% up to 10% impervious surface

**3 points**

- Greater than 10% and up to 15% impervious surface

**0 points**

- Greater than 15% impervious surface

**b. Trail Setback from Top of Stream Bank (maximum 15 points)**

**15 points**

- Greater than 50 feet average width from top of bank to trail

**10 points**

- Greater than 30 feet and up to 50 feet average width from top of bank to trail

**5 points**

- Greater than 15 feet and up to 30 feet average width from top of bank to trail

**0 points**

- Average width 15 feet or less from top of bank to trail

**c. Conservation Agreement Terms within Trail Setback (maximum 10 points)**

**10 points**

- Standard NCLWF conservation easement or restrictive covenants template with allowance for trail and amenities (benches, etc.)

**7 points**

- NCLWF conservation easement or restrictive covenants template with allowances for trail and other infrastructure (utilities), but with consideration of water quality protection incorporated in the construction

**5 points**

- NCLWF conservation easement or restrictive covenants template with allowances for trail and other infrastructure (utilities)

**0 points**

- NCLWF conservation easement or restrictive covenants template with exceptions for additional rights (driveways, parking next to stream, etc.)

d. Number of Potential Users within 10 Miles (maximum 5 points)

**5 points**

- Greater than 100,000 people

**3 points**

- Greater than 10,000 and up to 100,000 people

**1 point**

- Up to 10,000 people

e. Links with Prior or Continuing Greenway Efforts (maximum 10 points)

**10 points**

- Extension of existing greenway and trail construction funds have been identified OR
- Completely eliminates gap in existing greenway corridor

**8 points**

- Contiguous with existing greenway parcels, but construction is 5 or more years in future

**5 points**

- Along a greenway that is actively being constructed as sections are acquired, but disconnected from other parcels

**0 points**

- Parcel is part of inactive greenway corridor and disconnected from other parcels

**3. Natural Heritage** – Projects that represent the ecological diversity of North Carolina, to ensure their preservation and conservation for recreational, scientific, educational, cultural, and aesthetic purposes.

To receive points, the terrestrial natural area or element occurrences must exist on the tract, or the aquatic natural area or aquatic element occurrences must be adjacent to the tract. Element occurrences must be extant, not historical or extirpated. All ratings are determined by the NC Natural Heritage Program (NHP).

a. Natural Heritage Classification (maximum 30 points)

Points in this subsection will be awarded based on the highest level for which the project qualifies.

**30 Points**

- Natural area rated Exceptional (C1 or R1)

**25 Points**

- Natural area rated Very High (C2 or R2)

**20 Points**

- Natural area rated High (C3 or R3) OR
- Contains ecological natural community or species that is imperiled in NC (S1)

**15 Points**

- Natural area rated Moderate (C4 or R4) OR
- Contains ecological natural community or species that is rare in NC (S2)

**10 Points**

- Natural area rated General (C5 or R5) OR
- Contains ecological natural community that is vulnerable in NC (S3), with Excellent or Good viability (EO Rank of A or B)

**5 Points**

- Contains ecological natural community that is demonstrably secure in NC (S4 or S5), with Excellent or Good viability (EO Rank of A or B)

OR

- Provides riparian buffers for tributaries to NHP aquatic habitat (within 1 stream mile)

b. Contribution to Protection of NHP Natural Area (maximum 15 points)

**15 points – high contribution**

- Includes 50% or more of a terrestrial natural area OR
- Contains 1 or more of the defining element occurrences for the natural area (the most ecologically important elements at the site, which are used to determine the natural area rating)

OR

- Contains 3 or more small-patch element occurrences (usually rare elements of restricted extent, rather than widespread matrix communities)

**10 points – moderate contribution**

- Contains more than 10% and less than 50% of a terrestrial natural area OR
- Contains at least a portion of an element occurrence

c. Integrated Ecological Networks – Ecological Diversity (maximum 5 points)

**5 points**

- Borders property with a permanent conservation agreement in place for the purpose of protecting natural communities

OR

- Protects the entirety of a small-patch ecological community element occurrence tracked by the NHP

OR

- Property is 500 acres or greater

**3 points**

- Within 1 mile of a permanent conservation agreement in place to protect natural communities OR
- Property is 300-499 acres

**1 point**

- Within 1 mile of a property with deed restrictions and conservation management practices in place to protect natural communities

**4. Historic and Cultural** – Projects that contribute to the development of a balanced North Carolina program of historic properties.

Grants are considered for the land associated with significant historic sites. If a site contains buildings, structures, or objects, there must be a demonstrated funding source and organization responsible for their maintenance, management, repair, etc.

Historic and Cultural sites must demonstrate historic significance and retain the ability to convey such historic significance.

To receive points, the property must be, or be directly associated with, the site of a specific event or series of events, person(s), building(s), structures(s), and/or object(s).

a. Historic Significance of Property (maximum 20 points)

Points will be awarded based on the highest level for which the project qualifies.

**20 points**

- Marks an important moment in or demonstrates a significant influence on North Carolina or national history or culture

OR

- Contains information that contributes to our understanding of North Carolina or national history or prehistory by filling significant gaps in knowledge or providing alternative theories that challenge existing theories (archeological sites)

**15 points**

- Demonstrates or had a significant influence on a broader, more general aspect of North Carolina or national history or culture

OR

- Furthers understanding of North Carolina or national history or prehistory (archeological sites)

**10 points**

- Marks an important moment or demonstrates a significant influence on local history or culture

**5 points**

- Demonstrates or had a significant influence on a broader, more general aspect of local history or culture

**0 points**

- Specific event or series of events, persons, buildings, structures, or objects associated with the property are common in NC

b. Condition or Character of Property (maximum 10 points)

The property must retain ability to convey its historic significance.

**10 points**

- Features, artifacts, and spatial relationships have been preserved in excellent condition

**8 points**

- Features, artifacts, and spatial relationships have been preserved in good condition or can be returned to good condition

**5 points**

- Some features, artifacts, and/or spatial relationships have been lost but can be returned to a condition that will promote understanding of prehistory or history

**3 points**

- Many features, artifacts, and/or spatial relationships have been lost but can promote some understanding of prehistory or history

**0 points**

- Features, artifacts, and/or spatial relationships have been lost and the property will not add to our understanding of prehistory or history

c. Core Area or Location of Property (maximum 10 points)

The property must retain the ability to convey its historic significance.

**10 points**

- Location of historic significance and directly connects to a larger historic site or is located in a historic district

OR

- Location of historic significance separate from other historic sites and contains more than 50% of the land that contributes to the historic significance

**8 points**

- Not the specific location of historic significance but directly protects the integrity of the historic site

**5 points**

- Location of historic significance, separate from other historic sites, and contains 25%-50% of the land that contributes to the historic significance

**3 points**

- Location of historic significance, separate from other historic sites, and contains less than 25% of the land that contributes to the significance of the site

**0 points**

- Not the location of historic significance and does not directly buffer the historic site

d. Recognition of Property (maximum of 5 points)

**5 points**

- The property is listed on the National Register of Historic Places or on the Determination of Eligibility List or on the State Study List.

e. "Richness"/ "Complexity" of Property (maximum of 5 points)

Points will be given if multiple events can be interpreted from the same property.

**5 points**

- Associated with 2 or more historically significant events and the condition of the site allows multiple events to be interpreted

**3 points**

- Associated with 2 or more historically significant events but the condition of the site allows for only one event to be interpreted

**0 points**

- Not associated with 2 or more historically significant events, series of events, persons, buildings structures, or events

**B. Additional Resource Benefits (maximum 8 points).** The three lower scoring categories from Section I.A. (above) will each receive a discounted credit up to 4 points each.

Additional points will be awarded as follows:

1-24 points in lower scoring category -> 1

additional point 25-39 points in lower scoring category -> 2

additional points 40-45 points in lower scoring category -> 3

additional points 46-50 points in lower scoring category -> 4

additional points

<b>Section I. Scoring Example:</b> In this example, the application has the highest score in the Natural Heritage category. The other three categories receive additional resource benefit credit up to 4 points each.		
Category	Category Score	Points Awarded
1. Riparian Buffers	(35/50)	2
2. Riparian Greenways	(40/50)	3
3. Natural Heritage	(50/50)	50
4. Historic and Cultural	(20/50)	1
	<b>TOTAL</b>	<b>56</b>

**Military Buffers (5 points)**

**A. Priority to Installation (maximum 5 points).** Consideration will be given to properties that protect flight paths, ground training areas, or buffers around military bases.

Priorities and final points will be determined in consultation with personnel from military installations.

**5 points**

- Department of Defense funds (Readiness and Environmental Preparedness Initiative, Army Compatible Use Buffer, etc.) are committed

OR

- Identified by an installation as critical for continued use of installation or training OR
- Adjacent to an installation

**4 points**

- In a high priority zone as identified in a priority plan for the installation (includes flight path)

**3 points**

- Identified as an important buffer for existing training grounds

**2 points**

- In a medium priority zone as identified in a priority plan for the installation (includes flight path)

**0 points**

- Identified as low priority by installation or land use or is determined to be detrimental to military installation or training

**Other Public Benefits (7 points)**

**A. Recreational Uses/Open to Public Use (maximum 5 points).** Examples of recreational uses include hiking, nonmotorized biking, birding, and paddling.

To receive points, recreational or access plans must be substantiated.

**5 points**

- Open to public use most days of the year and has amenities to facilitate use (e.g., regular hours, parking area, trailhead information, maintained trails and/or roads, boat access, camping sites or platforms); opening of tract to public use is realistic within 5 years

**4 points**

- Will be accessible from public roads and open to public use on regular basis but without amenities to facilitate use

**3 points**

- Will be added to a public unit but is remote or restricted (no access from public road or trail) OR
- Open only through guided hikes OR
- Along route of future trail or riparian greenway (trail is shown in a plan but will not be constructed for 5 for more years)

OR

- No access because entire tract has sensitive archeological sites determined by State Historic Properties Office or has harassed and poached species determined by NC Natural Heritage Program

**2 points**

- No public access, but provides intrinsic qualities to publicly owned property such as greenway buffers or obvious viewshed protection or is identified in a viewshed study

OR

- Open only to camp or conference, etc. attendees

**B. Public or Scientific Education (maximum 2 points).** Education must focus on natural, cultural, or historical values of the tract.

To receive points, educational efforts must be substantiated.

**2 points**

- Will house an educational facility OR
- Organization managing the tract has full-time education staff for visitors and it will be used in educational programming

OR

- Educational organization or program has agreed to provide programs on a regular basis OR
- Specifically identified scientific studies will be conducted by educational institutions OR
- Will be used for identified long-term scientific research

**1 point**

- Will be used for training events or educational programming on a limited basis OR
- Will be used for guided educational hikes open to public on a limited basis OR
- Designs and funds are available for passive educational signage and interpretation OR
- Will be used for environmental classes/education at camps, conferences, etc.

OR

- Organization has capacity for education and tract will likely be used for educational programming

**Readiness and Need (10 points)**

NOTE: To be considered for funding, a signed letter of intent to sell or a purchase contract or option is required and must be submitted to NCLWF.

**A. Landowner Interest (maximum 2 points). 2 points**

- The landowner has signed a purchase contract or option

**B. Funding Status (maximum 3 points). 3 points**

- Percent of match secured/committed x 0.03

**C. Included in a Comprehensive, Long-Term Plan (maximum 3 points).**

Comprehensive, long-term plans must be adopted by a State agency, local government unit, or a nonprofit corporation whose primary purpose is the conservation, preservation, or restoration of the State's cultural, environmental, or natural resources, prior to NCLWF application deadline.

Plans must clearly state goals and objectives that are consistent with one or more of NCLWF's statutory criteria.

The following requirements are considered for scoring:

- be written for a 5-10-year planning horizon
- be less than 10 years old
- include multiple stake holders and/or data layers or sources (multiple organizations, input from public meetings or surveys, etc.)



- be jurisdiction wide (local governments) and/or resource-wide (i.e., entire watershed, region, natural community, historic district, greenway corridor, etc.)

**3 points**

- Parcel is specifically mentioned in a comprehensive, long-term, land-use plan that meets all the required elements defined by NCLWF

**2 points**

- Parcel is specifically mentioned in a comprehensive, long-term, land-use plan that meets most of the required elements defined by NCLWF

**1 point**

- Parcel is not specifically mentioned in a comprehensive, long-term, land-use plan, but is consistent with goals of the plan

**0 points**

- Parcel is not in an area covered by a comprehensive, long-term, land-use plan

**D. Likelihood of Land-Use Change and Development (maximum 2 points).**

To receive points, the project must be within the Probability of Urbanization 2050 areas of likelihood greater than 0% based on the SLEUTH Projected Urban Growth dataset or Applicant must provide documentation that the project area will be developed or degraded to an extent it will not be available for conservation or restoration (e.g., mines, quarries, etc.).

**2 points**

- Any parcel at least partially within the “Probability of Urbanization 2050” areas of likelihood greater than 0% based on the SLEUTH Projected Urban Growth dataset from the South Atlantic Conservation Planning Atlas

OR

- A parcel with well-documented evidence of development or land-use change that is incompatible with conservation or restoration (e.g., within a municipal ETJ, zoned and platted for development, permitted for mining, etc.)

**1 point**

- Any parcel within one-half mile of the aforementioned boundaries

## Value (20 points)

**A. Matching Resources (maximum 20 points).** Matching resources will be given a value based on the percentage and type of match. Any fraction in the final total will be rounded up.

1. Private funds (including bargain sale and donated value) = % of total x 0.22
2. Federal or local government funds = % of total x 0.18
3. Other State funds = % of total x 0.14

<b>Matching Value Example:</b> In this example, the request is for \$40K from NCLWF with matching resources coming in the form of cash from a land trust, bargain sale from the landowner (\$30K) and a federal grant (\$30K):			
<b>Match source</b>	<b>Match (%)</b>	<b>× Multiplier</b>	<b>Points</b>
Private funds, including bargain sales and property value	30%	0.22	6.6
Federal or local government funds	30%	0.18	5.4
Other State funds	0%	0.14	0
<b>TOTAL</b>			<b>12</b>

## Application Form Printable Copy

This is a copy of the acquisition application questions for the current grant cycle. It is provided to give the entire scope of the application and let you see all questions that will be asked as you complete the questions online. **This is not the actual application.**

The application is a web-based form available at: <https://nclwf.nc.gov/apply>

You will need to enter a username and password to access each program's form for the first time.

We suggest using the Gmail or Microsoft account option, or your email as your username. Once signed in, you will be able to save your progress and re- access your application. You can also start subsequent applications under the same username.

*(Application form copy follows)*

# NCLWF Acquisition Funding Application - 2024

The entire NCLWF Acquisition Program application form is below. Please use the Save and Return function to save your work.

**Formsite Logistics:** You must have a Formsite account to access this form, so you've completed the first step! If you did not use the Google or Microsoft sign-in option, please save your user-name and password. The same login will allow access to all applications within a given program and year.

If you apply to multiple programs, you may use the same credentials, but you will need to initiate each program separately.

To prevent accidental data loss in the event of internet connectivity issues, we **strongly encourage** you to write and save any narrative sections on your own device and copy and paste into this form.

Save your work with the 'Save Progress' or 'Next Section' buttons at the bottom of each page.

You may edit/re-edit your form and click '**Submit**' as many times as needed prior to the deadline of 11:59pm, March 1. You will receive an email with a copy of your application attached after each instance of clicking 'Submit'.

Staff will not review your submission until after the deadline.

**Funding Manual:** It is critical that you use the Acquisition Program's [Applicant Funding Manual](#) as a reference when filling out this application. Referencing the funding manual, even for returning/seasoned applicants, will result in additional score opportunities, reduced issues with scope, contract and closings, and better likelihood of a successful outcome. Please use the Funding Manual!

**Budget:** The budget is uploaded in Section 7, but you may wish to download the [PDF Budget Form](#) now. The Funding Manual contains critical information pertaining to each budget sub-section, and the budget contains some of that same info. Successful budgets follow the Funding Manual instructions and guidance!

**UPDATED: NCLWF Application Mapping Tool:** We have published a web-based mapping application that may help you answer some questions. The [Application Mapping Tool](#) may not include all necessary data, such as the most detailed [Natural Heritage Program Data](#) (requires an account to view full detail).

File attachment/upload sections include:

- PDF Budget
- Location Map
- Property Map
- Improvements Map (if needed)
- GIS shapefile of parcel/easement boundaries NOT including excluded areas (zipped)
- Letter of Intent to sell or Purchase Contract
- Riparian Greenway Property Owners Table (if applicable)
- Greenway master plan screenshot/excerpts (if applicable)
- Conservation plan screenshot/excerpts
- Conflict of Interest documents, if applicable.
- Other attachments (multiple documents may be combined into one PDF)

This cycle, Virtual Project Review Meetings will occur after site visits. Your Field Representative will be in touch to schedule the site visit.

**Public information:** Applications submitted to NCLWF are subject to the North Carolina Public Records Law and may be disclosed to third parties upon their request.



## SECTION 1 - APPLICANT INFORMATION

1.1 - Organization Name \*

1.2 - Organization Type \*

1.3 - Person from the applicant's organization that will administer the grant contract, if awarded:

Name (Contract Administrator) \*

Title (Contract Administrator) \*

Mailing Address (Contract Administrator/Payments) \*

Email (Contract Administrator) \*

Phone Number (Contract Administrator) \*

828-555-1212 x100

1.4 - Person that NCLWF Field Representative should contact for application review:

Note: this email contact will receive an editable copy of the application upon submission, see note at end of application form.

Name (Project Manager) \*

Title (Project Manager) \*

Email (Project Manager) \*

Phone Number (Project Manager) \*

919-555-1212 x100

1.5 - Person who will actually sign the grant contract, if awarded. If repeat of above name, please enter here again.

Name (Contract Signee) \*

Title (Contract Signee) \*

Email (Contract Signee) - Used by NCLWF for DocuSign \*

1.6 - Fiscal Year of Applicant \*

- January 1 - December 31 (Calendar/Annual)
- July 1 - June 30 (Fiscal)
- October 1 - September 30 (Federal)
- April 1 - March 31 (Alternative)

1.7 - State of Non-Profit Incorporation (if applicable) \*

▲ 1 / 2 ▼

## SECTION 2 - PROJECT INFORMATION

2.1.A - Project Name

NCLWF uses a naming convention of tract name followed by stream or other feature such as natural area, game land, etc. If landowner name is part of your organization's project name convention, please use it here and NCLWF will try to include. This will help reduce confusion during the contracting and closing process.

(100 character maximum) \*

### 2.1.B - Re-application?

If this is a repeat application, or substantially similar to a previous NCLWF application, please state the year of last application and NCLWF application and project title, if known.

### 2.2 - Total Project Acres

This includes NCLWF and match acres (if match acres apply) \*

### 2.3 - Primary County \*

### 2.4 - Project Coordinates

Please use Decimal Degrees from the [Application Mapping Tool](#) coordinate widget. Place at the center point of the project and test the coordinates before submitting.

#### Latitude:

This is a positive number, between 33 and 36. \*

#### Longitude:

This is a negative number between -84 and -75. \*

**Narratives** - Be concise and discerning with information, covering key components and background if needed. Narratives are limited in word length as noted below each text box.

### 2.5 - Project Overview

Provide a succinct description of your project.

Summarize the project conservation strategy, resource values, public benefit and partnerships, if applicable. Think of this overview as how you would describe the project to a decision maker, funder, elected official, reporter, etc. (200 word limit)

Click the "?" at right for samples. \* ?

0/200 words

### 2.6 - Unique Benefits

Describe any unique benefits or circumstances of the project that you would like to bring to NCLWF's attention. (150 word limit)

0/150 words

### 2.7 - Protection Strategy

Please complete the table below. All of the acres in the project must be protected and be reflected below. Please fill out ALL fields, with "0" if they do not apply. \*

	Total Acres in Category	NCLWF Acres	Match Acres
Purchased in fee and in State ownership by end of contract	<input type="text"/>	<input type="text"/>	<input type="text"/>
Purchased in fee and protected by a State-held conservation agreement	<input type="text"/>	<input type="text"/>	<input type="text"/>

Fee ownership remains the same and protected by a State-held conservation agreement

Conservation agreement held by a third party

### 2.8 - Conservation Agreement Types

Select all that apply. Not all projects have match areas. Each row must have a selection. \*

	NCLWF Area(s)	Match Area(s)	Not Proposed
Articles of Dedication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Determinable conservation easement held by state	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conservation easement held by state	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conservation easement held by third party	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Declaration of covenants and restrictions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Uncertain	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Scope of Work

The Scope of Work includes measurable tasks and deliverables that will be completed with either NCLWF or match funds as part of the project should the application be funded.

The following Scope items are standard examples across NCLWF acquisition projects and not all may apply to your project. Please review this list, adding your edits or additional items to the below, one item per line.

- Secure remaining match funds
- Obtain second appraisal
- Hire surveyor to survey property boundary and easement boundaries
- Draft and secure final purchase contract with landowner
- Hire firm to prepare Phase I ESA
- Hire attorney to a) investigate title history, and assist in remedying any exception title that could affect the project, b) draft a general warranty deed that could affect the project, c) obtain title commitment, d) draft other legal documents that might be needed at closing, and e) ensure closing documents are recorded properly
- Draft conservation easement using NCLWF template and restrictions for the remaining acres using organization's template
- Prepare baseline documentation report
- Recombine parcels
- Coordinate communication and supply information to landowners and professionals hired to prepare documents
- Submit post-closing (recorded) documents to NCLWF

### 2.9 - Scope of Work Additional (if necessary)

Add any tasks that are **different from or may replace or update items above**. Examples include: draft special warranty deed, convey property to ultimate landowner, etc.

DO NOT REPEAT ITEMS FROM ABOVE.

\*

0/100 words

## SECTION 3 - PROPERTY INFORMATION & RESERVED RIGHTS

### Note on Closing Timelines

Do not set expectations for a closing schedule with the landowner; for more information on NCLWF closing timelines, please review the [Applicant Funding Manual](#)

### 3.1 - Landowner Interest

Applications should be restricted to one owner/parcel/group of parcels and one closing. If your project involves more complex transactions, you must discuss the

project with your field representative before applying.

\*

- The property has been purchased or will be purchased before the NCLWF Board meets to grant funding awards.
- The landowner(s) signed a purchase option/contract.
- The landowner(s) signed a letter of intent to sell an easement or the property in fee simple.
- A letter of intent or purchase option/contract will be submitted by the early July update.

### 3.2 - Letter of Intent or Purchase Option/Contract Upload

A signed letter of intent or signed purchase option/contract must be submitted by the early July update to be considered for funding. All letters of intent must be from the current landowner(s), signed, and dated within 12 months of the anticipated award date. The Acquisition [Applicant Funding Manual](#) contains a sample letter of intent. Purchase option/contracts must be current and not expired, dated, signed, and extend at least through the first quarter of the following calendar year.

**Please note: if a purchase option/contract includes the Tax Identification Number (TIN) or Social Security Number (SSN) of the landowner, redact this information prior to upload.**

Failing to provide letter of intent or purchase option/contract by the early July update will result in automatic withdrawal.

No file chosen

### 3.3 - Who owns the property at the time of application submission?

List the names of all property owners for all parcels involved in the project. \*

### 3.4 - Who will own the property at the time of the grant funding decision (October of the year of submission)? \*

### 3.5.A - Owner Type At Completion/Closing \*

### 3.5.B - Who will own the property at the completion of the project? \*

### 3.5.C - Agency Owner (if applicable)

### 3.5.D - How has the ultimate owner/at closing been consulted and confirmed the closing timeline is acceptable? \*

### 3.6 - If there will be a state-held easement on this project, who will monitor that easement?

### 3.7 - If a portion of the project will be protected with an easement not held by the state, who will hold and monitor that easement?

### 3.8 - Special Event or Other Group Uses

NCLWF permits income generation from any approved reserved rights provided there are no impacts to the conservation values. List any group activities or events that may occur on the property such as fundraisers, special events, or festivals.



0/150 words

**Reserved Rights in Conservation Agreements (3.9 and 3.10 below)**

Review the list of Reserved Rights found in the [Acquisition Funding Manual](#). The Funding Manual details information on limitations, numbers, locations, and more for each item below.

Note that these standard reserved rights are by default included in all conservation agreements: Passive recreation; natural surface trails for hiking; paved trails (such as greenway or universal access trails); pedestrian foot bridges; native community restoration, management, and maintenance; stream and wetland restoration; hunting and fishing; maintenance of existing roads and trails; vegetation management with limitations; use of motor vehicles for management/emergency use.

The following reserved rights are subject to restrictions and must be requested in your application. **Select Reserved Rights that should be included in your request and reviewed by the Board of Trustees:**

**3.9.A - Reserved Rights in NCLWF Areas**

- Maintenance of limited, existing open areas for passive recreation outside 100' buffers/NHP areas
- Maintenance of existing early successional habitat outside 100' buffers/NHP areas
- Group camping
- Covered picnic facilities
- Mountain biking
- Horseback riding
- Observation/Viewing platforms
- Docks
- Toilets
- Parking

**3.9.B - Additional NCLWF Reserved Rights and Notes**

If additional Reserved Rights are requested in NCLWF areas, outline them here one item per line/paragraph.

If any of the checked boxes above require explanation, you may do so here. At the minimum, parking, facilities, and maintenance of open areas should get further explanation (if requested).

**Note: Any rights requested after the project has been approved by the Board may not be granted or may result in delays at closing.**

0/350 words

**3.10.A - Reserved Rights in Match Areas**

- Maintenance of existing open areas
- Group camping
- Covered picnic facilities
- Agriculture (crops)/Grazing/Horticulture
- Timber management
- Mountain biking
- Horseback riding
- Observation/Viewing platforms
- Docks
- Toilets

Educational facilities

### 3.10.B - Additional Match Reserved Rights and Notes

If additional Reserved Rights are requested for match areas, outline them here one item per line/paragraph.

If any of the checked boxes above require explanation, you may do so here. Not all checked boxes require explanation.

**Note: Any rights requested after the project has been approved by the Board may not be granted or may result in long delays at closing.**

0/350 words

### 3.11.A - If applicable, has the eventual/final owner been consulted regarding reserved rights?

If no, please **have this conversation prior to the site visit**, and plan on having a representative of the eventual owner present. \*

- Yes, the future fee owner has been consulted on Reserved Rights
- No
- N/A

### 3.11.B - Who will be attending the site visit?

Please include a representative of the eventual landowner or agency, if applicable. \*

0/100 words

### 3.12.A - List all known roads, utilities, or easements of any kind and activities presently occurring or planned to occur on the proposed conservation areas.

0/150 words

### 3.12.B - How many acres of open (maintained as open) areas are currently on the property? List the type of open area with the acreage if possible. \*

### 3.13 - Transfer after Completion of Project

After closing, does the owner intend or have plans to convey to the property to a third party not already explained above? (sale to a conservation buyer, transfer to municipality, transfer or sale of fee to state agency, etc.)

0/150 words

**3.14 - Was any property in this project donated or subject to bargain sale (i.e. partial donation) to your organization prior to this application?**

If yes, you will be required to document the agreement of the donation to NCLWF to determine if the donation is eligible for funding or match credit. \*

- No
- Yes, documents pertaining to the donation will be submitted to NCLWF as part of this application.

**3.15 - Special Considerations for Use of Structures**

Acquisition of land that includes buildings or structures may only be considered as a case-by-case exception. If there are structures on the property, discuss the long-range plans and management implications.

0/150 words

**3.16.A - Plans Covering Property**

Is the property subject to or prioritized in a strategic conservation plan, regional plan, watershed conservation plan, or other planning document that identifies the parcel, area, or region as a conservation priority?

Plans may be from your organization, state agency, regional council, etc. and must be adopted by the grant submission deadline. Full scoring plans are less than 10 years old, describe a 5- to 10-year planning horizon, include multiple stakeholders/data inputs, and cover the watershed or jurisdiction that applies to your project.

Coverage by only one plan is required to score for this section, but more than one plan may be referenced if necessary.

**Please only submit a screenshot/excerpt of the pertinent plan pages.** Do not provide the entire plan. Do provide plan information on date, adoption, page number in the fields below. For the plan/file itself, only share screenshot(s), image, or page extraction of pertinent plan pages. **Failure to provide uploaded plan screenshot/excerpt will result in no credit being given for the plan.** Plan excerpts are reviewed but not archived.

\*

- Parcel is specifically mentioned in qualifying plan
- Parcel is specifically mentioned in partially qualifying plan
- Parcel is not specifically mentioned but is consistent with goals of the plan
- No plan coverage

**3.16.B - Plan Information (if applicable).**

If we cannot find your specific parcel information, it cannot receive full points. Please mark up your screenshot/excerpt if needed.

	Plan Title	Adopting Org & Date of Plan	Page reference to parcel location
1			

**3.16.C Plan Screenshot/Excerpt Attachments**

Do not obscure property with screen mark-up. Limit of 5 10MB files. combine files into one PDF if possible.

No file chosen

**3.17 - Urgency**

If funds are not awarded for the purchase of the property or an easement this grant cycle, will there be a future opportunity to protect the property? Please explain. \*

0/150 words

**3.18 - Likelihood of Land Use Change and Development**

NCLWF staff will assign development likelihood score based on the SLEUTH model 50-year predictions. Use the [Application Mapping Tool](#) to see the likelihood of development at or within 1 mile of your project. If you feel that your project is more likely to be developed than the model predicts:

Is there documented, **project parcel-specific information** of a high likelihood that the property will be developed or changed in the near future? May include mines, quarries, incompatible development, zoning changes, local growth patterns and pressures, new transportation infrastructure, etc.

0/100 words

▲ 3 / 4 ▼

## SECTION 4A - RESOURCE SIGNIFICANCE - RIPARIAN

### 4A - Riparian Buffers

In addition to the information you provide below, NCLWF staff will identify stream classifications using data available on the [Application Mapping Tool](#) that is current at the application deadline.

Does this project buffer a stream or waterbody?

**If the proposed project will protect land along surface waters or otherwise have a significant impact on water quality, please complete every question in this section.**

Note: Projects that do not physically buffer a waterbody will not be scored in this category. \*

Yes  No

**You selected 'No' above. Skip to the bottom and advance to the next page.**

#### 4A.1 - Name of Primary Stream(s) or Waterbody (250 words) and their classifications:

Using the [Application Mapping Tool](#) and/or the [NC DWR waterbody classification mapping application](#), list the primary streams, waterbodies, and/or wetlands found on the property.

You may also include the Waterbody Classifications that will support scoring as defined in the Application Rating System, Resource Significance section of the [Applicant Funding Manual](#).

Your answers below will help staff assess the application and will help you understand your project's overall resource value.

If you feel additional information is needed that is not found in official Waterbody Classifications, you may briefly describe.

- Downhill River, B, Wild Trout; - UT to Enchanted Creek, ORW, .9 mi upstream from River Styx 303d listing

0/250 words

#### 4A.2 - Connection to riparian buffers protected by recorded conservation agreement, deed restriction, or dedication under State Nature Preserves Act

Provide name, distance, and type of conservation restriction recorded for adjacent or nearby protected riparian buffers, up to one stream mile from the subject property. You may use the [Application Mapping Tool](#) to find adjacent or nearby managed areas; if you are aware of a conservation agreement not shown on managed areas, please provide the book and page of the conservation agreement.

Slurpy Swamp Sanctuary - conservation easement held by land trust - .6 miles

#### 4A.3 - How many linear feet of stream buffer are protected within the boundary of the proposed conservation agreement(s) on the property subject to this application?

Linear feet of buffer should count each side of the stream. For example, if 1,000 feet of stream are protected on both sides, enter 2,000 linear feet of buffer.

#### 4A.4 - How did you calculate the total linear feet of protected buffer on the property subject to this application?

Break down your waterbodies by length of protected buffer, in feet.

**NOTE:** Count both sides of stream if both sides have protected buffer. 1,000' of stream protected on both sides = 2,000' of buffer.

John Doe Creek - 3,000', A Name River - 4,500'

#### 4A.5 - How many acres of wetland are on the project?

0/75 words

▲ 4 / 5 ▼

## SECTION 4B - RESOURCE SIGNIFICANCE - NATURAL HERITAGE

### 4B - Natural Heritage

NC Natural Heritage Program (NHP) staff will review applications in this section using current data found in the NC [Natural Heritage Data Explorer](#). In addition, NHP staff may contact you for an on-site visit.

If the proposed project will protect Natural Heritage elements/and or communities, please complete every question in this section.

Does this project protect Natural Heritage elements and/or communities?

Note: All projects, regardless of your answer below, are evaluated by Natural Heritage staff for potential resource values. \*

Yes  No  Unsure

You selected 'No' or 'Unsure' above. Skip to the bottom and advance to the next page.

#### 4B.1 - Primary Natural Heritage Program Elements and Communities

Using the NC Natural Heritage Program's [Data Explorer](#), review the natural heritage values of your project and summarize the primary/highest ranking elements below. Element Occurrence ranks that end in 1, 2, or 3 are especially notable, as are communities labeled as High, Very High, and Exceptional.

Do not attach a report from the Natural Heritage Program's Data Explorer to your application.

For example: Found on site: Superb Fancy Animal S1S2, Pristine Valley natural area - 2-Very High

4B.2 - Are you aware of any natural areas or element occurrences that might be unknown to the NC Natural Heritage Program staff? Please share the source for this information.

0/250 words

**4B.3 - Do you know of any recent activities that may have impacted the natural communities on the property?**

0/150 words

**4B.4 - Natural Community Information Upload**

If applicable, you may upload data to supplement NHP info on file.

Choose File No file chosen

▲ 5 / 6 ▼

## SECTION 4C - RESOURCE SIGNIFICANCE - RIPARIAN GREENWAYS

### 4C - Riparian Greenways

To qualify for this section, the greenway must run parallel to and buffer a stream. Qualified riparian greenways must connect people to points of interest, such as but not limited to parks, schools, businesses, or downtown areas. They must provide vegetated riparian buffer and incorporate a paved or unpaved pedestrian trail that may also be used for non-motorized biking or horseback riding.

Riparian Greenways must also be part of a comprehensive greenway plan of one mile or more, adopted by an organization that is responsible for developing the greenway. The parcels subject of an application must be identifiable in the adopted greenway plan. The plan must be adopted prior to the grant application deadline.

Funds for this program may only be used for land acquisition. Funds may not be used for greenway or trail design, permitting, or construction.

**If this project includes a Riparian Greenway, please complete every question in this section.**

**Does this project acquire land for a Riparian Greenway? \***

Yes  No  Unsure

**You selected 'No' or 'Unsure' above. Skip to the bottom and advance to the next page.**

**You selected 'Yes' above. Please answer all Riparian Greenway questions below. If a question does not apply, please mark it as "n/a" or "none."**

**4C.1 - Name of Riparian Greenway System**

**4C.2 - Name of organization responsible for implementing and maintaining the greenway**

**4C.3 - Length of greenway trail to be built on parcel subject to this application (feet - numbers only):**

4C.4 - Total miles of greenway trail (existing or proposed) in adopted plan:

4C.5 - What is the average width of the property/properties to be protected, in feet (numbers only)?

4C.6 - What is the average width of the trail to be built, in feet (numbers only)?

4C.7 - What is the planned average distance of the trail setback from top of stream bank?

- Greater than 50 feet average width from top of bank to trail
- Greater than 30 and up to 50 feet average width from top of bank to trail
- Between 15-30 feet average width from top of bank to trail
- Less than 15 feet average width from top of bank to trail

4C.8 - Conservation Agreement Terms within Trail Setback

- Standard NCLWF easement or restrictive covenants
- Easement or restrictions with infrastructure (utilities) and additional water quality considerations
- Easement or restrictions with infrastructure (utilities)
- Easement or restrictive covenants with exceptions for additional rights

4C.9 - Briefly describe any structural or non-structural best management practices that are incorporated into the greenway system that protect water quality.

0/150 words

4C.10 - Number of Residents that Live Within 10 Miles of the Riparian Greenway (based on total population)

- Less than 1,000 people
- Between 1,000 - 10,000 people
- Between 10,001 - 100,000 people
- Greater than 100,000 people

4C.11 - Describe efforts to provide public access to the greenway corridor (existing parks, new parking areas, access from other trails, etc.)

0/150 words

4C.12 - Connections with Prior or Continuing Greenway Efforts

- Extension of existing greenway and trail construction funds have been identified
- Completely eliminates a gap in an existing greenway corridor
- Contiguous with existing greenway parcels, but construction is 5 or more years in future
- In greenway corridor actively being constructed, parcel disconnected from other parcels
- Part of an inactive greenway corridor and disconnected from other parcels
- None

4C.13 - Is there an adopted Greenway Plan for the subject greenway?

- Yes
- No

#### 4C.14 - Greenway Plan Information

If claiming Riparian Greenway scoring, please list the name of the plan, the organization that has adopted it, and the page on which the relevant greenway and/or property can be identified.

	Plan Title	Adopting Org & Date of Plan	Page reference to parcel location
1			

#### 4C.15 - Greenway Plan Screenshot

Do not obscure property with screen mark-up. Limit of 5 10MB files. combine files into one PDF if possible.

No file chosen

#### 4C.16 - Greenway Property Owners Table Upload - Required if completing the Riparian Greenways section above.

Download this [PDF Form](#) (link opens in new window), fill out, and upload below. Name the file "[pipe:37] greenway owners.pdf"

No file chosen

**NOTE:** To qualify for Riparian Greenway scoring, you must submit information on the adopted Greenway plan and a completed Riparian Greenway Property Table with the application.

## SECTION 4D - RESOURCE SIGNIFICANCE - HISTORIC & CULTURAL

### 4D - Historic and Cultural

If the proposed project contributes to the development of a balanced State program of historic properties, complete this section. NCLWF staff will verify the significance of cultural and historic sites protected by the project with the NC State Historic Preservation Office (HPO). All projects, regardless of filling out information in this section, will receive a screening against HPO's publicly available data on [HPOWeb](#) as well as against the Office of State Archaeology's data.

The NCLWF's primary focus is on the acquisition of land. If the site contains structures, a management and maintenance plan for the structures must be uploaded with the application. Include the name of the organization that will maintain the structures and source of funds for maintenance.

The historic event or significance of a site needs to be substantiated through literature, site surveys, etc.

**If this project preserves a historic or cultural site, please answer every question in the following section.**

#### Does this project preserve an aspect of history or culture?

Note: Note: All projects, regardless of your answer below, are evaluated against Historic Property Office's publicly available data on HPOWeb and well as against the Office of State Archaeology's data. \*

- Yes
- No
- Unsure

**You selected 'No' or 'Unsure' above. Skip to the bottom and advance to the next page.**

#### 4D.1 - What is the name of the historic or cultural site in question?

#### 4D.2 - Site Protection

Is the historic or cultural site protected or will it be protected with a perpetual conservation or historic preservation agreement/easement? If so, list the type of restriction and its book and page, if recorded.

Projects that buffer unprotected sites may not be awarded score in this section.



#### 4D.3 - National Register of Historic Places Eligibility

If the historic or cultural site is listed or determined eligible for listing on the National Register of Historic Places, or on the State Study List, please specify listing status for each site.

0/100 words

#### 4D.4 - Site Significance

Please explain the historical and/or cultural significance of the property with respect to state and/or national history. Describe any structures, features, or items of historical significance present on the property at the time of the application.

0/250 words

#### 4D.5 - Condition of historic or cultural site to be directly protected or buffered by NCLWF project site

- Preserved in excellent condition
- Preserved in good condition or can be returned to good condition
- Some loss of integrity but can be returned to a condition that will promote understanding of prehistory or history
- Significant loss of integrity but can promote understanding of prehistory or history
- Significant loss of integrity and will not add to understanding of prehistory or history

#### 4D.6 - What percentage of the property is in the core area?

The core area is defined as the area of the property directly related to the historic or cultural site in question

- The property is part of a larger historic site, such as a battlefield or a historic district
- Property is not the location of historic significance but directly protects the integrity of the historic site
- Separated from other historic sites and contains more than 50% of the core area
- Separated from other historic sites and contains 25%-50% of the core area
- Separated from other historic sites and contains less than 25% of the core area
- Not the location of historic significance and does not directly buffer the historic site

#### 4D.7 - How many events can be interpreted from this property?

- Associated with 2 or more events which can be interpreted from the property
- Associated with 2 or more events but only 1 can be interpreted from the property
- Associated with 1 event

#### 4D.8 - List the events that are referenced in 4D.7 above.

0/100 words

#### 4D.9 - What is the current land use? (if the Historic and Cultural section applies)

#### 4D.10 - What is the prior land use? (if the Historic and Cultural section applies)

**4D.11 - Historic and Cultural Information Source(s)**

Site the source of the answers in this section.

0/75 words

## SECTION 5 - MILITARY BUFFERS

If the project contributes to the protection of the military mission in North Carolina, please complete every question in this section.

**Does this project buffer a military installation, including training areas or critical flight paths?**

NCLWF staff will verify significance of military buffers with military representatives. \*

Yes  No  Unsure

You selected 'Yes' above. Please answer all military buffer questions below. If a question does not apply, please mark it as "n/a" or "none."

**5.1 - What is the name of the base that would benefit from this project?**

- Dare County Bombing Range
- MCALF Bogue Field
- MCAS Cherry Point
- MCAS New River Air Station
- Military Ocean Terminal Sunny Point
- NCNG Camp Butner
- US Army Camp Mackall
- US Army Fort Bragg
- US Army Pope Field
- USAF Seymour Johnson
- USMC Camp Lejeune

**5.2 - If other/additional installations will benefit, list them.**

**5.3 - How would you describe the relationship of this project with respect to the military base?**

- Adjacent to an installation
- Identified as critical for the continued use of installation or training grounds
- Important buffer for existing training grounds
- In a high priority zone for installation, including flight path
- In a medium priority zone for installation, including flight path
- In a low priority zone for installation

**5.4 - Briefly explain how this project will benefit the military mission in NC.**

0/250 words

## SECTION 6 - OTHER PUBLIC BENEFITS

### 6.1 - Other Public Benefits - Recreation and Public Access

Explain if the property will be open for public access, provide examples of future uses of the property for public recreation, and where possible, please list the expected time frame until opening. (200 words maximum)

0/200 words

### 6.2 - Other Public Benefits - Educational and/or Scientific Research

Explain if the property will be used for education or research and list specifics such as who will use, type and frequency of use, signage, etc. (200 words maximum)

0/200 words

Your answers to the above questions, along with field representative-gathered information determines final scoring in this section.

▲ 9 / 10 ▼

## SECTION 7 - BUDGET

Detailed guidance for completing the project budget can be found in the current year [Acquisition Funding Manual](#).

Budgets must be filled out using this [PDF Budget Form](#). The link will open a file link in a new window. Download to your local system, **save it to your project files**, complete the budget, and then upload it below. Do not fill out the budget in your browser window.

Please name your file based on your project name (entered and revised if needed in question 2.1) as follows: "[pipe:37] budget.pdf"

### 7.1 - Budget Upload

Download the [PDF Budget Form](#) mentioned above, fill it out, and upload here. Budget totals in your sheet **MUST** match the budget summary questions below.

You may edit and replace this uploaded budget at any time up until the submission deadline.

Choose File No file chosen

### 7.1.UC - Budget Upload - Updated/Corrected

Correct/update the budget that was emailed and attach here. Budget totals in your sheet **MUST** match the budget summary questions in this form, below.



Choose File No file chosen

### 7.2 - What is your total request from NCLWF?

This number should match your PDF budget sheet total request column. Please double-check before submitting!

No decimals or dollar signs, just a formatted whole number like: 12,340 \*

12,340

### 7.3 - What is your total match to NCLWF?

This number should match your PDF budget sheet total match column. Please double-check before submitting!

No decimals or dollar signs, just a formatted whole number like: 12,340



12,340

### 7.5 - Costs Incurred Before Award

Identify any costs to be incurred before NCLWF grant award decisions for which you would request approval of matching funds, including fee simple property purchases. Eligible match credit may include invoices to vendors for due diligence such as appraisals.

Time before an award, including staff or contractor time to complete and submit an application, is not eligible.

- Appraisal(s)
- Phase I Environmental Site Assessment
- Transaction Costs related to fee purchase prior to award
- Acquisition Costs related to fee purchase prior to award
- Other:

▲ 10 / 11 ▼

## SECTION 8 - Maps, Other Attachments

Attachments are uploaded below by individual category. Please name your file based on your project name of [\[pipe:37\]](#) as follows:

Smith\_Location Map.pdf  
Smith\_Project Map.pdf  
Smith\_LOI.pdf  
Smith\_Regional Plan.pdf  
etc.

For maps, a georeferenced PDF is requested. Avenza-ready PDF files exported from exported from ArcGIS with embedded georeferenced information are best, if possible. Maps will be displayed in a square format for board presentations.

**PLEASE** use the map guidance (updated this year) in the [Application Funding Manual](#) to guide map making, colors, types, content, etc. The [Application Mapping Tool](#) is now available for applicant's who do not have ArcGIS options. Detailed instructions are in the funding manual - the tool may take a minute to load. Please use this tool rather than upload images and screenshots of other mapping tools if you do not have ArcGIS/PDF export options.

We receive hundreds of maps and using our standard format makes it easier for staff and Trustees to understand your project accurately for funding decisions.

If you feel that other attachments are necessary, you may combine them into one PDF and use the 'Other' file upload field. Note that not all 'Other' attachments will be included in the final application packet.

### Location Map

File name should be: Smith\_location\_map.pdf or similar.

Short file name please. See map guidance above and in funding manual. PDFs only. \*

No file chosen

### Property Map 1

File name should be: Smith\_property\_map.pdf or similar. Short file name please. See maps guidance above and in funding manual. PDFs only. \*

No file chosen

### Property Map 2

File name should be: Smith\_improvements\_map.pdf or similar, depending on content. Short file name please. See maps guidance above and in funding manual. PDFs only.

No file chosen

### Improvements Map

No file chosen

### Shapefile (zipped)

Shapefiles are comprised of 5-7 files in total, zipped into a single .zip file. See example below of shapefile components.

A georeferenced shapefile containing the project/easement boundaries must be submitted with the application in order for it to be complete. If you need help creating the shapefile, please contact your [field representative](#).

Each area protected by a different conservation agreement should be delineated. For example, if the riparian buffers will be protected with a State-held easement and the upland areas will be protected with a land trust easement, each of those polygons should be represented in the shapefile.

\*

No file chosen

Name	Type
ProjectName_Boundary	dbf
ProjectName_Boundary.cpg	CPG File
ProjectName_Boundary.prj	PRJ File
ProjectName_Boundary.shp	SHP File
ProjectName_Boundary.shx	SHX File

### Other Attachment if needed (up to 3)

Note that NCLWF does not request or have a specific scoring process for letters of support, formatted narratives, photos, etc. Up to three files. PDF please.

No file chosen

**NOTE:** You answered yes to item 3.14 (property was donated to your organization prior to the application). Please attach all documents related to that donation above. A single PDF may be used for these documents and other items.

## SECTION 9 - AGREEMENTS & AFFIRMATION

### 9.1 - Conflict of Interest Statement

Do any members of your staff or board, or their immediate family, have a conflict of interest or an appearance of a conflict of interest, including but not limited to any financial interest in the subject project or adjoining properties, or in contracts for services proposed in this application? \*

- No known conflict of interest or appearance of conflict
- Yes, there is a conflict of interest or appearance of conflict

### 9.2 - Conflict of Interest Summary

If a conflict of interest or an appearance of a conflict of interest exists, briefly explain and summarize actions taken by your organization. This content should also be summarized in attachments.

0/250 words

### 9.3 - Conflict of Interest Uploads

If a conflict of interest or an appearance of a conflict of interest exists, upload a copy of the applicant and/or partner organization's Conflict of Interest Policy and any minutes, notes or memoranda related to any actions or discussion of the project. (combine into a single PDF, no larger than 15mb)

No file chosen

**9.4 - Data Use Agreement:** NCLWF uses third-party, cloud-based platforms to accept, review and store application materials. These platforms are restricted to staff users only and have a high level of security and privacy protections in place. Current platforms are: [Airtable](#) and [Formsite](#). Applications are subject to the North

Carolina Public Records Law and may be disclosed to third parties upon their request.

**Do you agree to allow NCLWF to handle and store your application materials via cloud-based third-party performs?**

If you cannot say 'Yes' below, please do not submit this application, and contact your field representative for help with an alternative application process TBD.

\*

- Yes, I consent to have my application data processed on these highly secure platforms.
- No, I do not consent to have application data reviewed on these platforms. I will NOT submit this application now.

### 9.5 - Affirmation of Application Materials

Do you affirm that the information in this application and the statements and attached exhibits are true, correct, and complete to the best of your knowledge and belief? Do you further confirm that you are authorized to file this application and the organization you are representing has the authority to enter into a grant contract that may result from this application? \*

I affirm the above statement.

**Name of Affirmed \***

**Sign below with mouse or touchscreen device: \***

[clear](#)

**SUBMIT your correction/update once, before midnight June 15.**

### ADMIN ITEM ON

#### SUBMITTING YOUR APPLICATION

You may edit/re-edit your form and click '**Submit**' as many times as needed prior to the deadline of 11:59pm, March 1. You will receive an email with a MS Word of your application attached after each submission.

Staff will not review your submission until after the deadline.

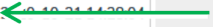
Bookmark the Save and Return link available at <https://nclwf.nc.gov/apply> to re-access and edit your applications for this program area.

Applications must have been submitted at least once prior to the deadline as indicated on your log-in landing page. Sample below:

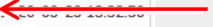
View your stored results below.

Start New

	Reference #	Updated
Edit	14281172 ✓	2020-09-21 14:33:04
Edit	14281154 ⚠	2020-09-21 14:33:04
Edit	14265608 ✓	2020-10-20 16:33:17
Edit	14257376 ✓	2020-09-25 09:10:14
Edit	14248381 ✓	2020-09-21 14:13:35
Edit	14248357 ✓	2020-09-21 14:08:54



Ready for deadline



Not ready for deadline

**DO NOT SCAN OR FLATTEN** - Submission must be the 'live' form as downloaded.

## 2024 NCLWF Acquisition Application Budget Form



<b>Project ID Number (Admin Field)</b>	2024 ACQ Budget.pdf
Project Name	
Applicant Organization	
Name of Project Manager	

**Whole dollar amounts only please.**

**NOTE:** Budget guidance from the Funding Manual is reproduced below - please review before completing this form.

Requested Funds	Matching Funds	Total Budget
\$ 0	\$ 0	\$ 0

GMS #	Line Item	Requested Funds	Matching Funds	Line Item Total
D001	Property or Cons. Agreement Acquisition			\$ 0
D002	Transaction Costs	\$ 0	\$ 0	\$ 0
D013	Contract Administration Costs			\$ 0
D012	Property Management Costs	\$ 0	\$ 0	\$ 0
D011	Stewardship Endowment	\$ 0		\$ 0
<b>Total</b>		<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>

### Transaction Costs

[Jump to: Stewardship Table](#) | [Match Table](#)

Item	Requested Funds	Matching Funds	Item Total
Appraisal			\$ 0
Second Appraisal			\$ 0
Surveys and Boundary Marking			\$ 0
Phase I Environmental Site Assessment			\$ 0
Baseline Documentation Report			\$ 0
Title Insurance			\$ 0
Legal Fees and Closing Costs			\$ 0
Recording Fee			\$ 0
Taxes			\$ 0
<b>Total</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>

### Property Management Costs

Item	Requested Funds	Matching Funds	Total
			\$ 0
			\$ 0
			\$ 0
<b>Total</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>

### Per Acre Valuation

Total Protection Acres	Acquisition Cost/Acre*	Basis for Value
0.0		Select one:

\* Total acquisition line D001 divided by total acres



**Matching Resources** Please Group by source/status. **DO NOT** split match items from a single entity.

Sources of Matching Funds (Name of Organization/ Entity)	Origin/Type of Matching Funds	Matching Funds Applied To (Primary/Majority Use)	Amount	Secured/ Committed?
				?
				?
				?
				?
				?
				?
				?
				?
<b>Total Matching Funds</b>			<b>\$ 0</b>	

**Check for Match Errors Here**

Jump to: [Main Budget](#)

**NOTE:** Please **group match by source** within commitment status. For example, if the applicant organization is providing in-kind match that will apply to three line items (and it is committed), include only one match line above and select the primary/majority use in 'Matching Funds Applied To'.

**Stewardship Monitoring Worksheet for State-held Conservation Easements**

<b>STAFF TIME TO MONITOR STATE-HELD CE (Salary and Benefits)</b>	Quantity	Rate	Cost
A) Staff time prior to visit - includes landowner contact & file review. Capped at 2 hours	0	<b>\$ 50.00</b>	\$ 0
B) Staff time to monitor State-held easement - includes travel, discussion with landowner, onsite monitoring, photos, reporting boundary markers.	0		\$ 0
C) Staff time post-visit - includes completing monitoring report, submitting documentation. Capped at 3 hours	0		\$ 0
D) Post-monitoring activities - includes activities related to enforcement of minor violations.	0		\$ 0
<b>Total Staff Time</b>			<b>\$ 0</b>

<b>OTHER MONITORING EXPENSES</b>	Quantity	Rate	Cost
E) Travel cost for monitoring visits - reimbursed per mile	0	\$ 0.67	\$ 0.00
F) Incidental Supplies for annual boundary marking - tape, paint, etc.	0	\$ 0.00	\$ 0.00
G) Other monitoring cost, previsit mailings, etc.	0	\$ 0.00	\$ 0.00
Explain:			
<b>Total Other Expenses</b>			<b>\$ 0</b>
<b>Total ALL Expenses/Year</b>			<b>\$ 0.00</b>
Total Acreage to be Monitored with these Funds:			
<b>STEWARDSHIP ENDOWMENT (ANNUAL Total x 25)</b>			<b>\$ 0</b>

Jump to: [Main Budget](#)

## Acquisition Program Budget Guidance

### Use of Funds and Timing of Expenses

The below chart provides general guidelines on allowable uses of NCLWF Acquisition Program funds.

- The funding or match credit for any item not listed on this chart will be determined solely by NCLWF.
- Award date is the date that NCLWF Board of Trustees approves funding.
- All expenses reimbursed by NCLWF must occur after the award date and be substantiated by invoices.
- All expenses credited for match incurred prior to award date must be requested at time of application.
- Match funds must be for items otherwise eligible for NCLWF funds.
- Details and restrictions follow in the Application Budget Line Items section.

### Allowable Use of Acquisition Program Funds Chart

Item	NCLWF Funds - expenses incurred <i>after</i> award date only	Match Funds - expenses incurred <i>after</i> award date	Match Funds - expenses incurred <i>prior to</i> award date and were requested at time of application
<b>Acquisition</b> - fee simple	Yes	Yes	Yes
<b>Acquisition</b> - conservation agreement	Yes	Yes	No
<b>Transaction Costs</b> required for acquisition	Yes	Yes	Yes
<b>Contract Administration Costs</b>	Yes*	Yes*	No
<b>Property Management Costs</b>	Yes*	Yes*	No
<b>Stewardship Endowment</b> (easement monitoring)	Yes*	Yes*	No
Mitigation or open space spending/activities	No	No	No
Overhead (office rent, telephone, etc.)	No	No	No
Educational signage	No	No	No
Education facilities	No	No	No
Greenway/trail design, permitting, and/or construction	No	No	No
Park improvements and amenities	No	No	No
Removing or replacing an in-stream structure (dam, culvert, etc.)	No	No	No
Removing an out-of-stream structure (buildings, barns, pavement, etc.), or cleaning up debris or dumping	No	No	No

\* Limitations apply to the use of funds for this purpose

## Expenses prior to award date

- NCLWF **will not reimburse funds** for any expense incurred prior to grant award date.
- **Expenses after the award date** and prior to contract effective date - NCLWF will reimburse transaction costs incurred after the grant award notwithstanding the costs may occur prior to the grant contract effective date; however, funds will not be available until after the execution and encumbrance of a NCLWF grant contract. Funds will only be reimbursed if the grant recipient complies with all terms and conditions in the subsequent grant contract.

## Properties acquired before the award date

- If the **fee simple interest in the property is purchased before the NCLWF award date**, NCLWF will only reimburse toward the land interest obtained by the state through the contract:
  - If the organization that purchased the property will continue to own the property, NCLWF will reimburse toward the conservation agreement value.
  - If the property is intended for transfer to the state and a determinable conservation easement is recorded until this transfer can occur, NCLWF will reimburse toward the determinable conservation easement value.
  - If the property will be immediately owned by the state at the end of the contract period, NCLWF will reimburse toward the fee simple value.
- When all or a portion of the property is purchased before the award date, the difference between the fee value and the conservation agreement value may be used as match.

## Application Budget Line Items

### Property/Conservation Acquisition

Appraisals are required for all fee simple and conservation agreement purchases, including property purchased with funds from NCLWF and property value used as match.

- **Appraisal(s)** are not required at time of application to determine the property or conservation agreement acquisition line items and professional judgement may be used for estimation purposes. However, an appraisal will help you in better planning your budget, as appraisals will be required to be submitted to NCLWF if the project is awarded.
- **Number of appraisals** - A minimum of one appraisal is required to determine the fair market value of real property interests being acquired through the project.
  - Exception: When the tax assessed land value (“tax value”) of a real property interest is less than \$100,000, the tax value will be acceptable in lieu of an appraisal. For fee transactions, up to 100% of the tax value may be used as substantiation of value. For conservation agreement-only transactions, up to 80% of the tax value may be used as substantiation of value.
  - A second appraisal is required when the value of a real property interest, irrespective of any bargain sale, exceeds or is expected to exceed \$500,000.
- The **State Property Office (SPO) appraisal review** process will determine a conclusion of property value. This process may or may not require revisions or other appraisals, at the discretion of the SPO.

- **Purchase price maximum** - no funds will be reimbursed for any portion of any purchase for which the purchase price is **in excess of the State Property Office conclusion value**, except as noted below.

Exception: For **greenways and acquisitions by municipalities and counties**, reimbursement for acquisition **may exceed SPO approved property value by up to 10% or \$20,000**, whichever is greater. Any amount over this must be considered by the Board of Trustees. This applies to greenway projects completed by non-profit corporations if it will avoid the use of eminent domain by a local government partner.

- **Condition at closing** - the value used for the budget and all appraisal(s) should reflect the condition of the property at closing and must exclude timber value if it has been contracted, sold, or harvested.

## Transaction Costs

- **Transaction Cost cap** - all applicants may request reimbursement for all eligible transaction costs to complete the project.
- **Eligible Transaction Costs** - up to two appraisals, survey, legal description, boundary marking, Phase I ESA, Baseline Documentation Report, title insurance, legal fees and closing costs, recording fees, and the grant recipient's portion of property taxes
  - Please note that at a minimum for each project, including transaction costs for up to two appraisals, survey, legal description, boundary marking, title insurance, legal fees and closing costs, recording fees, and the grant recipient's portion of the property taxes **are strongly encouraged** as request or match.
  - Baseline Documentation Report expenses are required as request or match for all projects with conservation easements, determinable conservation easements, and declarations of covenants and restrictions.
  - Phase I ESA expenses as request or match should be included if concerns regarding contamination are known at time of application; otherwise, Phase I ESA is optional and at the discretion of the grant applicant. Evidence of contamination, as indicated by Phase I ESA or other means, may require clean-up plans that cannot be included as part of the project budget.

## Contract Administration Costs

- **Eligible Contract Administration Costs** - direct labor cost (salary and fringe benefits for staff and/or contractors) toward progress reporting, reimbursement requests, project scope management, budget management, and project schedule management.
- **Non-eligible Contract Administration Costs** - postage, phone charges, audits, and other overhead expenses are not eligible for reimbursement. Expenses to develop a project or apply for a grant are not eligible for reimbursement or as credit toward match.
- **Contract Administration cap** - conservation nonprofits and local governments may request reimbursement for Contract Administration at an amount up to 10% of the total Transaction Costs (requested and match) of a project, not to exceed \$25,000 per grant.

## Property Management Costs

- **Eligible Property Management Costs** - include money spent **securing a property or protecting resources**. Examples of eligible costs include the following: purchase and installation of gates or other barriers to prevent trespass; management/restriction of access points to areas with conservation values (streams, natural heritage areas, cultural, or historic areas); and immediate stabilization of eroding

streambanks. Other expenses may be deemed eligible by NCLWF pending substantiation of need at time of application.

- **Non-eligible Property Management Costs** - activities prohibited by another NCLWF Guideline and Practice, such as removing debris or structures from the property, are not reimbursable.
- **Eligible recipients** - nonprofit organizations, local governments, and state agencies without a dedicated land acquisition funding mechanism may request Property Management Costs.
- **Permission required at time of award** - expense must be identified in the application and approved by the Board of Trustees, incurred during the contract period, and be substantiated by an invoice from a vendor or signed form attesting to in-kind work.
- **Property Management cap** - request for funds and matching funds may not exceed a combined total of **\$5,000**.

## Monitoring/Stewardship Costs

- **Stewardship requirement** - a stewardship budget request, calculated by the Stewardship Endowment Worksheet, is required for projects that result in a conservation easement held by the state, including properties for which an eventual, but not immediate, transfer to state or federal government is intended. NCLWF Stewardship Endowment funds may only be requested for state-held conservation easements and therefore match easement lands should not be part of the endowment worksheet calculation. See note on Stewardship Matching Funds, below. All requests are subject to adjustment by NCLWF staff to ensure adequate funds.
- **Stewardship budget development** - when the applicant is designating an alternate monitoring organization, the monitoring organization must give input on the budget to ensure their costs are accurately estimated.
- **Staff time prior to visit** - time spent on preparing for the monitoring visit, including contacting the landowner (if applicable) and reviewing the easement, baseline, and previous monitoring reports. Pre-monitoring is capped at two (2) hours.
- **Monitoring** - time spent on the state-held easement property, including landowner discussion (if applicable), documenting the property, and reposting boundary markers as needed. Monitoring should also include the round-trip travel time from the monitoring organization's office. While there is no limit on monitoring hours, the estimate should include only the above activities and reflect the amount of time required to monitor a property respective to its size, ease of access, length of boundary, uses and reserved rights, etc.
- **Staff time post-visit** - time required to complete the monitoring report, process photos and GPS data, and submit documentation to NCLWF. Post-visit monitoring is capped at three (3) hours.
- **Post-monitoring activities** - time required to assist in addressing violations on state-held conservation easements when the property owned by a third-party landowner.
- **Travel cost** - round-trip mileage the monitor must travel to visit the property. For current grant cycle applications, NCLWF has set the rate at \$0.60/mile for planning purposes, but annual expenses will be reimbursed based on the current IRS mileage rate.
- **Supplies for boundary marking** - estimate for tape, paint, and signage for as-needed annual boundary reposting. This should not include expenses for entire property boundary remarking efforts, requests for which will be handled after closing through a separate management fund award process.

- **Other monitoring expenses** - use on an as-needed basis, listing the cost and description of the items proposed. Allowable expenses include supplies for pre-visit mailings, neighboring landowner mailings, follow-up title work, and similar expenses, subject to NCLWF staff approval.

## Matching Funds

NCLWF does not have a minimum match requirement. However, the percentage of match and the type of match are factored in the Application Rating System. Matching funds committed in the application budget must be documented and represent costs that are critical to completion of the project.

The percentage of NCLWF funds and matching funds in a contract must remain the same throughout the project. If the overall project cost is reduced, NCLWF funds and matching resource funds will both be reduced.

- **Qualified Matching Funds** - Matching Funds can only be considered if the costs are directly pursuant to the award and would be considered allowable match if incurred after the grant award date. Such contributions must be verifiable from grant recipient's records and must be necessary for the completion of the project objectives. Matching Funds must be for items eligible for NCLWF funds. For example, overhead may not be counted as matching funds.
- **Ineligible Matching Funds** - NCLWF grant awards may not be used as Matching Funds for other NCLWF grant awards. Funds used as match on prior NCLWF grant awards may not be used as match on other NCLWF grant awards.
- **Expenditure rate of Matching Funds** - Matching Funds should be expended at the same rate as NCLWF funds and in proportion to the original funding commitment by NCLWF. NCLWF will also expect that, upon completion of the grant project, that the original funding ratio of NCLWF funds to matching funds be maintained. For example, if a grant award is approved with NCLWF providing 50% of the total budgeted project cost, then at the end of the grant period, NCLWF expects to contribute up to the 50% cost and only up to the grant award amount.
- **Expenditure timing** - NCLWF grant funds and matching funds should be incurred within the same time frame. However, the Board of Trustees may consider approving credit for matching funds contributions for costs incurred with Matching Funds prior to the grant award date if specifically requested by applicant at time of application and approved by the Board of Trustees.
- **Stewardship Matching Funds** - applicants that will own match land protected by conservation agreement or hold a match easement may receive credit for stewardship funds set aside for their long-term obligations of monitoring and enforcement, provided there is documentation of the transfer of the funds to an endowment account prior to release of funds from NCLWF.