

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

NCLWF Donation Mini-Grant Budget Form

Revised 4/2025



Project Title	
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 Cost

GMS #	Line Item	Requested Funds	Matching Funds	Total Cost
		n/a		
	Total			

Transaction Costs

Cost Item	Requested Funds	Matching Funds	Total Cost
Surveys and Boundary Marking			
Appraisal			
Phase I ESA/Transaction Screen			
Baseline Documentation Report			
Title Insurance			
Legal Fees and Closing Costs			
Recording Fee			
Taxes			
Total			

Stewardship Monitoring Worksheet

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

OTHER MONITORING EXPENSES	Quantity	Rate	Cost
E) Travel cost for monitoring visits - Reimbursed per mile			
F) Incidental Supplies for annual boundary marking - tape, paint, etc.			
G) Other monitoring cost, previsit mailings, etc.			
Explain:			
Total Other Expenses			
Total ALL Expenses/Year			
Total Acreage to be Monitored with these Funds:			
STEWARDSHIP ENDOWMENT TOTAL (ANNUAL Total x)			
STEWARDSHIP ENDOWMENT REQUEST (1/2 TOTAL)			

Matching Resources **NOTE:** Match total here should equal total match from the top table.

Sources of Matching Funds	Amount
Total Matching Funds	

Budget - Eligible Expenses

Items eligible for reimbursement:

- Surveys, boundary marking, and legal descriptions
- Phase I Environmental Site Assessment or transaction screen
- Baseline documentation report
- Title insurance or title opinion
- Legal fees, closing costs, and recording fees
- Grant recipient's portion of property taxes
- Property Management – up to \$5,000 total between request and match
- Appraisals – only when the donor is not seeking tax incentives
- Project Administration Costs – up to 10% of total transaction costs for nonprofit and local government grant applicants; state agencies are not eligible
- Stewardship Endowment – up to 50% of costs for grant applicants with a dedicated stewardship endowment

Expenses Before and After Award

Donations before the award date

Projects in which the acceptance of donation occurred prior to the award date are not eligible for funding. Grant applicants may request an exception when the fee simple interest in the land was donated prior to award by discussing the project with their field representative and submitting an application by the next immediate deadline.

Expenses prior to award date

NCLWF will not reimburse funds for expenses incurred prior to the grant award date.

Expenses after the award date and prior to contract effective date

NCLWF will reimburse project 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.

Budget - Line-Item Detail

Requested Funds

Transaction Costs

All grant applicants may request reimbursement for all eligible transaction costs to complete the project.

Eligible transaction costs include: survey, legal description, boundary marking, Phase I ESA, transaction screen, baseline documentation report, title insurance, legal fees and closing costs, recording fees, and the grant recipient's portion of property taxes.

Appraisals are only reimbursable if the donor does not intend to seek tax incentives.

Property Management Costs

Eligible Property Management Costs include funds spent security a property or protecting resources. Examples of eligible costs include: 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, and 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.

Activities prohibited by another NCLWF Guideline and Practice, such as removing debris or structures from the property, are not reimbursable.

The request for funds and matching funds may not exceed a combined total of \$5,000. Local governments, nonprofit organizations, and state agencies without a dedicated land acquisition funding mechanism are eligible.

Project Administration Costs

Eligible Project Administration costs include 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.

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.

Nonprofits and local governments may request reimbursement for Project Administration at an amount up to 10% of total Transaction Costs (requested and match) of a project, not to exceed \$25,000 per grant.

Matching Resources

The value of the donation and at least 50% of the stewardship endowment, if applicable, are required as match. **The value of the donation must be greater than the funds requested from NCLWF.**

The value of the donation, determined by appraisal or tax card, is entered into the matching funds column.

If an appraisal is used, it should reflect the value of the interest being donated, either the fee simple interest or the value of the conservation agreement. Appraisals must exclude the value of structures or improvements. Conservation agreement appraisals must use the “before and after approach” of valuation.

If an appraisal is not needed or available at time of application, the tax value of the land may be used. For fee simple donations, 100% of tax value may be used as match. For conservation agreement donations, up to 80% of tax value may be used as match.

Matching resources must be for items eligible for NCLWF funds and must be necessary for the completion of the project objectives.

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.

Budget - Stewardship Monitoring Costs

Nonprofit grant applicants are eligible to request stewardship endowment expenses using the Stewardship Monitoring Worksheet in the budget.

The Stewardship Monitoring Worksheet will automatically enter 50% of the stewardship endowment into the NCLWF request line. The matching stewardship endowment line must be equal to or greater than the amount requested from NCLWF for stewardship endowment.

Stewardship Monitoring Estimate Components

Staff Time includes any salary and benefits associated with time spent on pre-monitoring, monitoring, and post-monitoring activities, as described below. The rate is \$50.

- **Staff time prior to visit** includes any 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** includes any time on the 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** includes the time required to complete the monitoring report, and process photos and GPS data. Post-visit monitoring is capped at three (3) hours.
- **Post-monitoring activities** includes the time required to address minor violations on the property. Generally, this should be nominal, as violations are difficult to predict and may not occur annually.

Other Monitoring Expenses include any incidental costs associated with monitoring the property and may require additional justification and approval.

- **Travel Cost** is defined as the round-trip mileage the monitor must travel to visit the property.
- **Supplies for Boundary Marking** should include an estimate for tape, paint, and signage for as-needed annual boundary reposting. Initial boundary marking should be included in transaction costs for a survey.
- **Other Monitoring Expenses** should be listed on an as-needed basis, with the cost and description of the items proposed. Allowable costs include supplies for pre-visit mailings, neighboring landowner mailings, follow-up title work, and similar expenses.

Annual Budget and Endowment Amount

The total of the above Staff Time and Other Monitoring Expenses is the estimated annual cost of monitoring the easement. This annual cost is multiplied by 25 to arrive at the total amount to be eligible for total stewardship endowment.

Grant recipients will receive up to 50% of the endowment estimate as a lump sum payment to be deposited into a stewardship endowment account.