CWMTF Minigrant Application Process

The CWMTF Minigrant Application must be completed using the new online **Grants Management System (GMS)**.

STEP 1. In order to create and submit a grant application, you must have access to the GMS. Check the following document for your organization and user name: CWMTF Authorized Users

- A. If you find your organization and user name on the list, you are already in the GMS - skip to Step 3.
- B. If your organization is on the list, but you are not listed as a user, skip to Step 2 to be added as a user.
- C. If you cannot find your organization name on the list, contact Terri Murray at 919-707-9122 to see if you are required to complete additional forms before moving on to Step 2.

STEP 2. Once you have confirmed or completed vendor registration, complete the GMS Access Authorization Form and email it to teresa.murray@ncdcr.gov. Within 10 business days you should receive an email containing a user ID and temporary password.

STEP 3. Log on the GMS using your user ID and password: https://www.ebs.nc.gov/irj/portal . NOTE: You must use Internet Explorer to ensure all system functions work properly. If this is your first time logging on, you will be prompted to change your password.

Application Process Checklist

☐ **Contact your field representative for guidance and assistance with your project.**

☐ **Download the PDF application form available through GMS to your computer. Saving this form to your computer will allow you to fill it out without a time limit on your session and allow you to share the document with colleagues.**

☐ **Complete the Application Form**

☐ **Assemble maps and any additional supporting documentation.**

☐ **Log on to GMS to complete budget tables found under "Create New Application" and click the "SUBMIT" button. Record GMS application number for future reference.**

☐ **Upload Application, required maps and all supporting documents.**

☐ **Applications will be accepted at any time and reviewed on a quarterly schedule (January, April, July, October)**


Quick Start to Navigating in the Grants Management System (GMS)

Note: You must use Internet Explorer in order for GMS to function properly.

1. Log on to the GMS Portal with your User ID and Password (https://www.ebs.nc.gov/irj/portal). The next screen you will see is the entry screen. Select the "DNCR Grants" tile. The three additional tiles will be largely unused, except that you may use the "My Profile" tab to change your password.

2. Once you get to the Home screen, the first thing you will need to do is to download the main application form for the program you are interested in. It can be found under the "Grant Processes" section at the "Application Form" link. Once you download that form, you may save it to your computer and complete it later. However, you must submit the completed form through the GMS - more on that below.
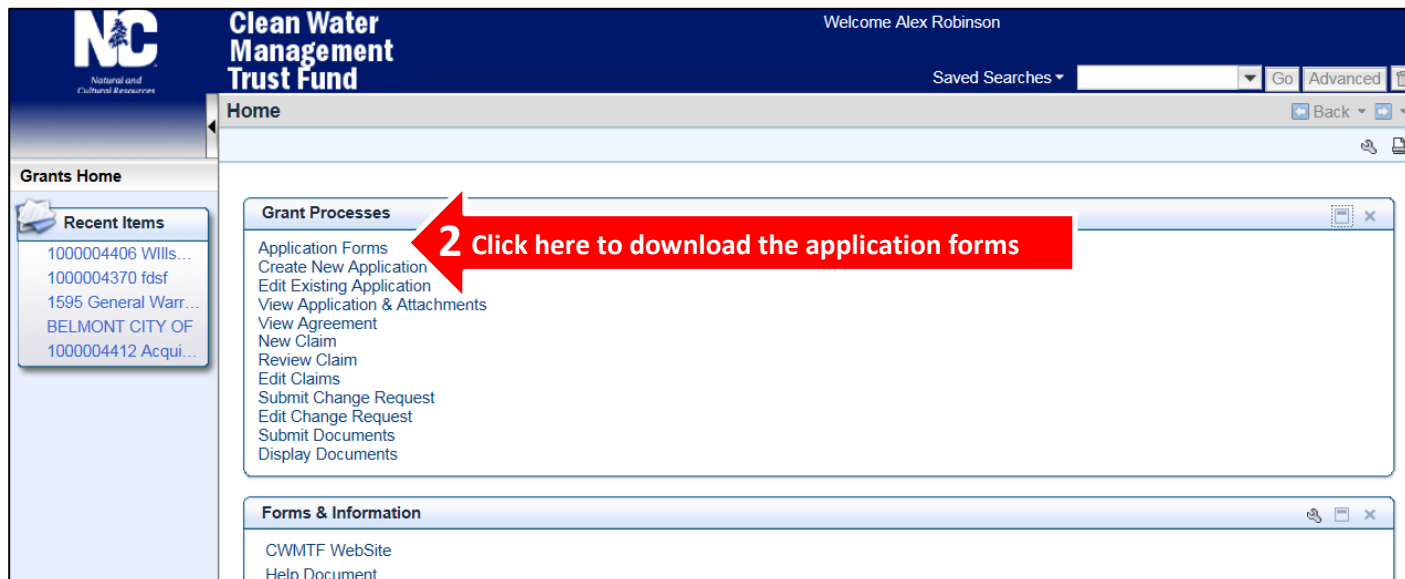
3. **We recommend that you exit the GMS, continue reading the guidance document and complete your application form before returning to complete the submission process.** However, when you are ready, return the screen above and select the "Create New Application" link. This will be the place where you complete the final part of the application and then have the opportunity to upload your application form and maps and other supporting documents.

TIP: Use the **Grants Home** and **Back** buttons to assist in navigation.
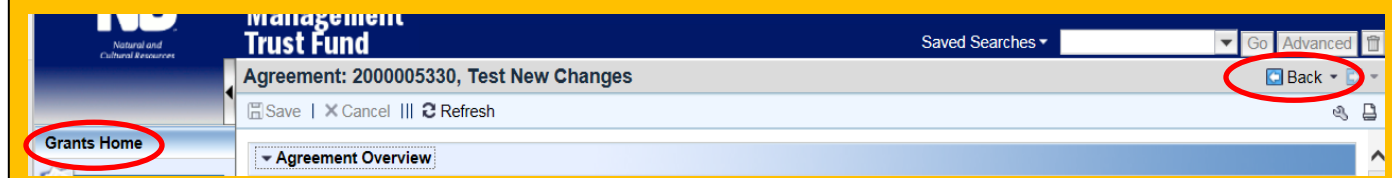
4. The "Create New Application" link will bring up the following screen, which allows you to search for the type of application you want to submit. However, given that we only have four to choose from, we recommend that you simply select "Search" with the fields blank to bring up all of the forms.

5. Once you select the link from the results list, you will open an embedded form that will prepopulate with some of your organization's information. Complete the available fields where needed. **Important: This budget form essentially creates the placeholder for your application in the GMS. It is through this step and the next that you actually submit your application and supporting documents to us through the upload documents part.**

6. Once you have completed this form, you have three options:

CHECK will make sure you have completed all the required fields on the form as needed.

SAVE will save your progress without submitting your form and will take you to the upload page to attach your other documents. You will be able to return later via the "Edit Existing Application" link on the Home screen.

SUBMIT will submit the form and take you to the upload page to attach your other documents and **you will not be able to make any changes after this point.** Don't do this unless you are absolutely certain you are finished.

7. After you SAVE or SUBMIT, you will go to the following screen that will allow you to upload your attachments. Please complete the Description field for the attachments using standard descriptions: Application, Maps, GIS Shapefile. Note that there is a better option for uploading documents mentioned after Step 9.

8. If you selected SAVE in step 6, you can still use the "Edit Existing Application" link on the Home screen to edit your application.
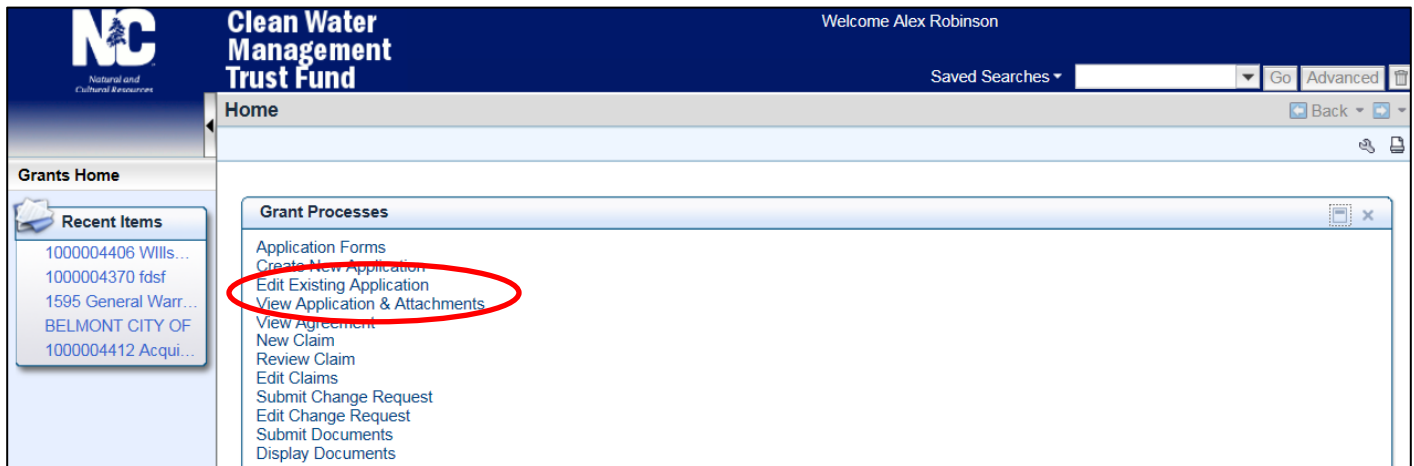
9. Use the **"View Application and Attachments"** link (shown above) to view your entire application package, including attachments. You can access this anytime after you have started a new application, including after you have selected SUBMIT.

TIP: Although you can use the screen that comes up in Step 7 to attach your documents, it is actually easier to submit documents under **"View Application and Attachments" section** by using the [Attachment] button.

CWMTF Minigrant Application Questions and Guidelines

This is a copy of the application questions for CWMTF minigrants. It is provided to give the entire scope of the application and let you see all of the questions that will be asked as you complete the questions online. It is not intended to be used as the application. Guidelines and helpful notes will appear throughout this section.

The documents that need to be completed and attach after the Budget has been Saved or Submitted through GMS are:
- Application PDF form
- Location Map
- Property Map
- Improvements Map (if needed)
- Copy of proposed conservation easement (if available)

See Section 7: Attachments for details on format and naming convention.

SL 143B-135.234 (c) Fund Purposes - Moneys from the Fund are appropriated annually to finance projects to clean up or prevent surface water pollution and for land preservation in accordance with this Article.

Donated Minigrant Funds

Donated Minigrants provide up to $25,000 or the value of the conservation donation, whichever is less, to pay transaction costs associated with the donation of property in fee simple, or a permanent conservation agreement. The donation must be for one of the following purposes:

- 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.
- Land containing natural areas, element occurrences, or species of concern as defined by NC Natural Heritage Program or adjacent buffer land that is critical to the viability of those areas
- Land buffering military installations
- Properties that help develop a balanced state program of historic properties (typically where historic or cultural events occurred), or the viewshed of such properties

Requirements

- The donation must be made to, and accepted by the organization applying for the Donated Minigrant.
- The value of the donation must exceed transaction costs.
- Donations must be made to an organization eligible to receive funds from CWMTF.

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

Eligible Applicants – to receive funds from CWMTF, the applicant must be a State Agency without a dedicated land acquisition funding mechamism; a local government unit; or a nonprofit corporation whose primary purpose is the conservation, preservation, and restoration of our State's cultural, environmental and natural resources.

Contracts and Reimbursement

- CWMTF funds will be released only after a conservation easement or other agreement, approved by CWMTF is recorded.
- Grant Contracts for donated conservation agreements will be for one year and may not be extended.

Eligible Expenses

Items eligible for reimbursement (up to 100% of costs)

- Surveys and Legal Descriptions
- Phase I Environmental Site Assessment - optional at the discretion of the applicant
- Baseline Documentation Report
- Title Insurance or Title Opinion
- Legal Fees, Closing Costs, and Recording Fees
- Project Administration Cost

Items eligible for reimbursement (up to 50% of costs)

- Stewardship Endowment Stewardship endowment funds will be paid lump sum to the grant recipient after recordation of the conservation agreement and must be deposited in an endowment for the purpose of monitoring the donated property or interest.

Appraisal
CWMTF will not pay for an appraisal on donations.
If the land owner does not want a tax credit for the donation, an appraisal is not required and up to 80% of the tax value of the property may be used to assign a value to the donation.

Matching Resource Requirement
The value of the donation is considered match funds. The value of the donation may be determined either by an appraisal or up to 80% of the tax value.

The value of the donation must exceed transaction costs.

Conservation Agreements Requirements
A permanent conservation agreement is required on all properties for which funds from CWMTF were used to facilitate the donation. The following instruments may be used:

- A conservation easement held by a qualified organization other than the state of NC
- restrictive covenants
- State Nature Preserves Act dedication

A conservation easement is preferred and does not have to be the CWMTF standard easement, but it must meet the requirements listed below and be approved by CWMTF.

The conservation easement must
- be held by a local unit of government or nonprofit qualified to receive funds from CWMTF
- protect significant riparian buffers, natural heritage communities, historic sites and viewsheds, and limit activities that would interfere with military installations, as appropriate for the specific tract
- grant an executory interest to the State of North Carolina;
- provide a right of access and a third party right of enforcement to the State of North Carolina; and
- provide that in the event the grant recipient transfers or assigns the easement to a third party, the organization receiving the interest is a qualified organization.

Restrictive Covenants may be applicable if a third party conservation easement holder is not practicable. The Covenants must
- protect significant riparian buffers, natural heritage communities, historic sites and viewsheds, and limit activities that would interfere with military installations, as appropriate for the specific tract
- include a notice of funding from CWMTF for the purpose of conservation

State Nature Preserves Act dedication are required for tracts donated to state agencies and may be appropriate for other properties. Applicants must work with CWMTF and Natural Heritage Program staff to determine eligibility.

Application and Review Process
Deadline for Application
Applications for Donated Minigrants may be submitted at any time.

Applications will be reviewed quarterly by CWMTF staff, along with Natural Heritage staff and Historical Resources Staff, as appropriate. The review meetings will be targeted for the first of October, January, April, and July. Applications must be received at least two weeks before a meeting date to be reviewed at the next meeting.

Approval of the grant has been delegated by the CWMTF Board of Trustees to the CWMTF Board of Trustees Chairman. The Chairman may approve or deny the request, may ask for additional information, or may ask for review by the entire CWMTF Board.

CWMTF will strive to review, and if approved, contract and close any Donated Minigrant applications received by CWMTF before the October meeting, by the end of the calendar year.

Approval of Donated Minigrants is subject to the availability of funds.

Application Requirements
Items listed below must be attached to the Budget form in GMS.

- Application PDF form
- Tax Parcel Card
- Location Map
- Property Map
- Improvements Map (if needed)
- Copy of proposed conservation easement (if available)

_____ *Two maps*
   One map should show the location of the property in context of major streams, major roads, nearby protected property, nearby municipalities, military bases, etc.
   The second map should show more details of property including clear property boundary, access to the property, all streams on the property, and any roads, development, or existing easements on the property.

Contract Requirements
All contracting requirements by the state of NC and CWMTF apply to Donated Minigrant Contracts.

Section 1. Applicant Information

1.1   Organization Name

1.2   Applicant Type   *State Government, Local Government, or Non-Profit*

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

Name
Title
Address 1
Address 2
Phone
Email

1.4   Person that CWMTF Field Representative should contact for application review:

Name
Title
Phone
Email

Section 2. Project Information

2.1   Project Name   *Often incudes tract name and name of stream or other feature*

2.2   Primary County

2.3   Other County   *More than 2 counties should be marked as Regional*

2.4   Narrative

PROJECT NEED – *Explain why this property is a priority for your organization. Please include connectivity to other conservation areas or compelling reasons*

DESCRIPTION – *Provide a legal description of the property, including acreage, deed book and page number. You may use or modify one of the formats below.*

- *That parcel of land situated _____ of _____Road (State Road _____) and _____ of _____Creek in _____ Township, _____ County, North Carolina, containing __ acres, more or less, owned now or formerly by _____, being that parcel of land identified in the _____ County tax records by the parcel identification number _____.*
                                                     OR
- *Being approximately ____ acres of a tract or parcel of land consisting of _____ acres described in a deed from _____ to _____ dated _____ and recorded in deed book ___, page ___ of the _____ County Registry.*
                                                     OR
- *Being all of Tracts A, B, and C totaling _____ acres, more or less, a shown on that map of record entitled "_____" dated _____, and recorded in Plat book __ at Page __ in the _____ County Register of Deeds.*

Section 3. Resource Significance

This section is divided into four categories: Riparian Buffers, Riparian Greenways, Natural Heritage, and Historic and Cultural. Applicants are encouraged to consider their projects comprehensively and complete questions for all four categories, if applicable.

3.A. Riparian Buffers – *If the proposed project will protect land along surface waters or otherwise have a significant impact on water quality, please complete this section.*

Does this section apply?

- ❑ YES
- ❑ NO

3A.1 Riparian Protection - *Complete the table below for waterbodies that would be protected by the proposed acquisition. For a DWR listing of stream names and classifications, [click here.](#)*
List small, unnamed streams as "unnamed tributaries" or "UT" and use the DWQ index number and classification of the named stream they flow into.

To download GIS data with waterbody classifications, [click here.](#)

Name of Stream *List primary streams on property*	DWR stream classification	Linear feet of buffer*	Average width of buffer (ft)

*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 lf of buffer.

3.B. Riparian Greenways – *If the proposed project will contribute to a network of riparian greenways for recreation, please complete the following section.*

Does this section apply?

- ❑ YES
- ❑ NO

3B.1 Name of organization responsible for implementing and maintaining the greenway:

3B.2 Name of greenway system:

3B.3 Corridor length subject of this application (miles):

3B.4 Total corridor length of greenway system (miles):   *must be at least 1 mile*

3B.5 Average width of greenway corridor/easement to be purchased or protected by an easement (feet):

3B.6 When is construction of the trail anticipated?

- ❑ within 1 year of acquisition subject to this application
- ❑ 1-5 years after acquisition subject to this application
- ❑ >5 years after acquisition subject to this application

3.C. Natural Heritage – *If the proposed project protects the ecological diversity of North Carolina, and ensures its preservation and conservation for recreational, scientific, educational, cultural, and/or aesthetic purposes, please complete the following section.*

Does this section apply?

- ❑ YES
- ❑ NO

Please share all you know about the natural areas on the tract. The NC Natural Heritage Data Explorer may be accessed at https://ncnhde.natureserve.org/.

3C.1 Name any natural areas defined by NC Natural Heritage Program you are aware of on the property.

3C.2 Name any element occurrences defined by NC Natural Heritage Program you are aware of on the property

3C.3 Name any Aquatic Natural Areas defined by NC Natural Heritage Program you are aware of within 5 miles downstream of the tract.

3C.4 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*.

3.D. Historic and Cultural – *If the proposed project contributes to the development of a balanced State program of historic properties, complete this section.*

The CWMTF's primary focus is on the acquisition of land. Funding for historic structures will be made case by case.   If the site contains structures, a management and maintenance plan for the structures must be uploaded with the application.

Does this section apply?

- ❑ YES
- ❑ NO

3D.1 If the historic or cultural site is listed or determined eligible for listing on the National Register, please specify the site name below.

3D.2 Please explain the significance of the property with respect to NC state history and culture and/or national history, and how it is essential to the development of a balanced NC state program of historic properties. [*limited to 250 words*]

3D.3 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 event on the site in question.

- ❑ Greater than 40% in the core area
- ❑ Between 20% and 40% in the core area
- ❑ Less than 20% in the core area
- ❑ Protects the buffer or viewshed of an existing protected site

3D.4 Condition of historic or cultural site to be directly protected.

- ❑ Site is relatively undisturbed.
- ❑ Site has been somewhat modified or disturbed, but still has capacity to yield information important in history or prehistory.
- ❑ Neither of the above is true.

Section 4. Military Buffers

Does this section apply?

- ❑ YES

- ❑ NO

4.1 What is the name of the base or installation near this project?

4.2 How would you describe the relationship of this project with respect to the military base?

- ❑ Adjacent to military installation or existing training grounds for military personnel
- ❑ Provides additional training grounds for military personnel
- ❑ Within important land use planning area but not adjacent to a military base or training grounds
- ❑ Protects critical airspace
- ❑ Unique mission-critical circumstance or other benefit not listed above (explain below)
- ❑ None of the above

4.3 Briefly explain unique circumstances or other benefits of protecting the property subject to this application for buffering the military mission. *[limited to 250 words]*

Section 5. Property Information and Conservation Agreements

Important Notes on Property Conservation:

- *You will be asked to complete a stewardship table when you complete the budget table in GMS. The amount calculated on the budget sheet must be split between CWMTF and Grant Recipient, with CWMTF funding no more than 50% of the endowment amount.*

Important Notes on Accepting Donation Before the Award Date:

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

5.1 Protection strategy – Please complete the table below. All of the acres in the project must be protected and be reflected below.

	Acres
Donated in fee and encumbered with a conservation easement	
Donated conservation easement	
Donated in fee with restrictive covenants	
Donated in fee and dedicated under the State Nature Preserves Act	
Totals	

5.2 Who owns the property at the time of application submittal?

5.3 Who will own the property at the completion of the donation?

5.4 If there will be a conservation easement on this project, who will monitor that easement? *Note that the state of NC does not hold easements through the Donated Minigrant Program.*

5.5 List all reserved rights requested in the area to be protected under the easement, restrictive covenants, or dedication *[limit 250 words] Attach a copy of the proposed conservation easement or template typically used by your organization.*

5.6 List all known improvements, easements of any kind, utilities and activities presently occurring in the proposed easement areas. *[limit 250 words]*

5.7 Land Management – How will the land be managed? *If there are any professionally prepared plans (e.g. forest management plans, stewardship plans, etc...), please refer to them. [limit 250 words]*

Section 6. Budget

The Project Budget must be completed using the online Grants Management System (GMS). Please log on at www.ebs.nc.gov and select Create New Application from the Home Page. **A screenshot of that budget can be found near the end of this document.**

Important Notes on the Budget:
Expenses prior to award date - CWMTF will not reimburse funds for expenses incurred prior to grant award date.

Appraisals - CWMTF will not reimburse for the cost of an appraisal. If the land owner does not need an appraisal, CWMTF will accept up to 80% of the tax value of the conservation area as match value.

Project Administration Cost

The cost that is eligible for reimbursement as Project Administration is direct labor cost toward Progress Reporting, Reimbursement Requests, Project Scope Management, Budget Management, and Project Schedule Management. If you request Project Administration reimbursement or want to demonstrate Project Administration as match, you must submit itemized documentation of staff/contractor hours and hourly compensation rates (salary and fringe benefits) for time spent on project administration on a form provided by CWMTF.

Overhead, postage, phone charges, and audits are not reimbursable. Mileage is reimbursable only for completing a Baseline Documentation Report.

Matching Resources

- *Match must be verifiable from grant recipient's records and must be necessary for the completion of the project objectives.*

- *Matching resources must be for items eligible for CWMTF funds. For example, overhead may not be counted as matching resources.*

Section 7. Attachments

After completing the Budget using the online Grants Management System, upload the Application and other Attachments listed below.

- *Convert documents to .pdf*
- *Use smallest file size possible*
- *Use the following naming convention:* **Project Name_Application**
  Project Name_Location Map
  Project Name_Property Map
  Project Name_Improvements Map
  Project Name_Tax Card
  Project Name_Proposed Conservation Easement
  *Use the Project Name that was entered in Question 2.1
- *Upload documents individually*

Maps

At least two maps are required. A third map is needed if there are existing or planned easements, utilities or activities that overlap with the proposed CWMTF conservation easement. An aerial photograph is required if you do not use an aerial photograph as the background for the second map.

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
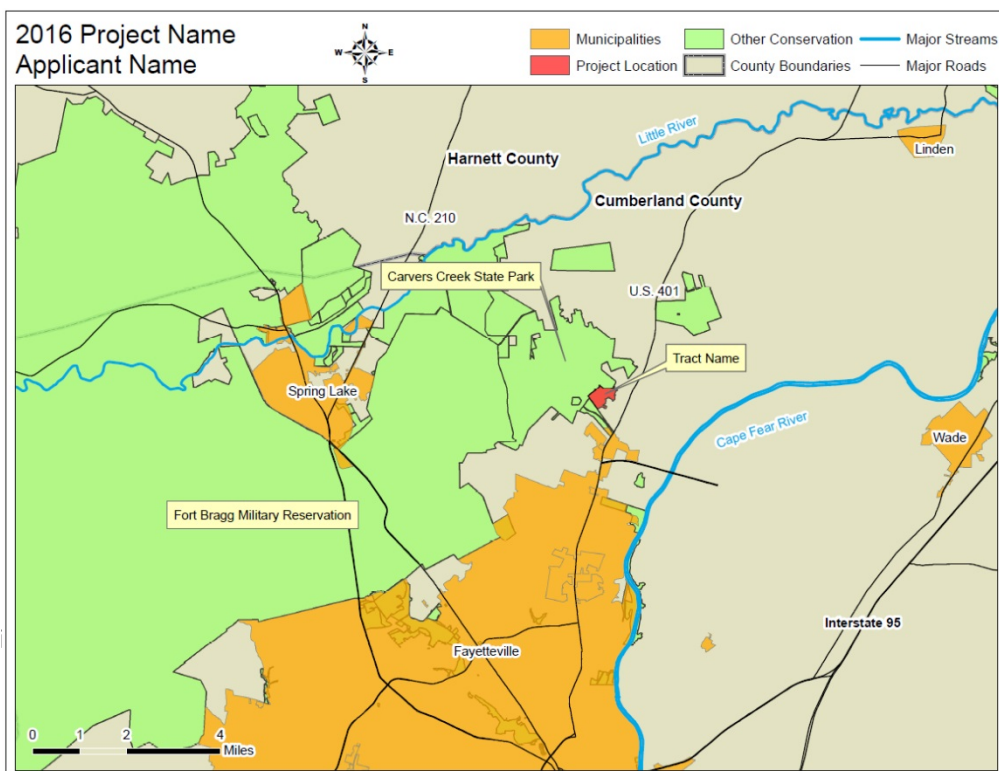
Project: Red

Other Conservation: Green

Major Roads: Black

Labels: Major streams, major roads, municipalities, and county boundaries should be clearly labeled. Labels of secondary streams and roads are not necessary on this map. Any significant landmarks or other conservation lands should be labeled as well.

Location Map example 1:
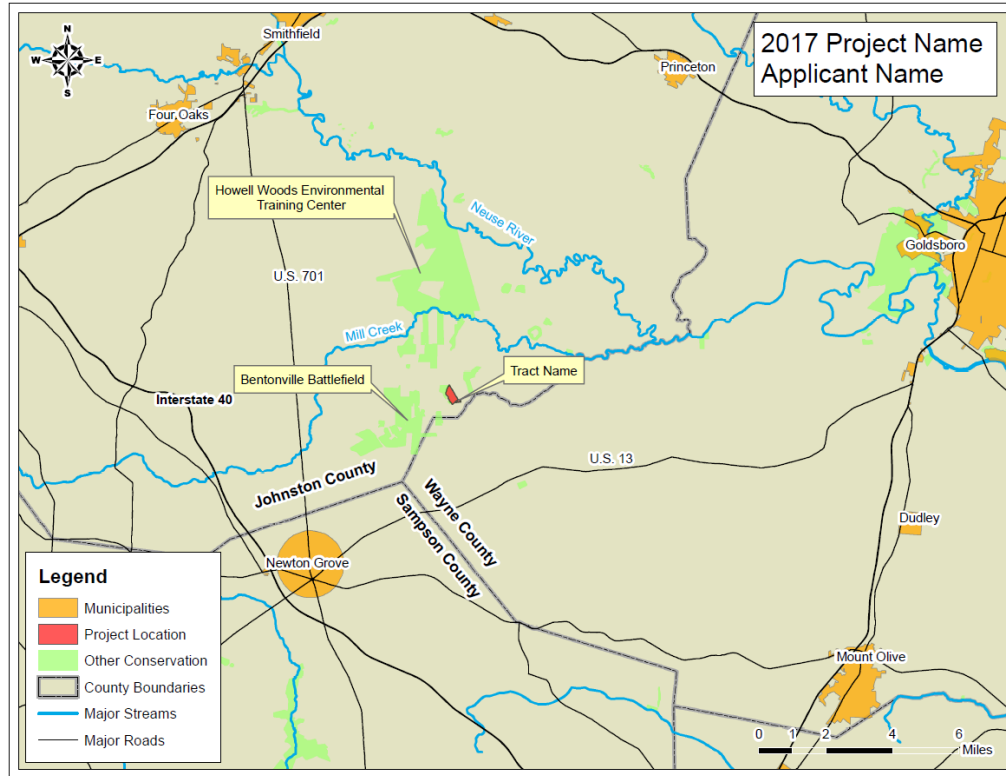
Location Map example 2:

CWMTF Acqu

Property Map *Show more details of the property including a clear property boundary, access to the property, all streams on the property, roads, and the proposed easement area(s) as well as the riparian buffer or 100-yr. floodplain, if applicable. Use an aerial photograph as background, if possible.*

Background: a recent aerial image if possible; if an aerial photo is not a possibility, please follow the guidelines for the location map.
Planned CWMTF Easement/Stream Buffer: Red outline
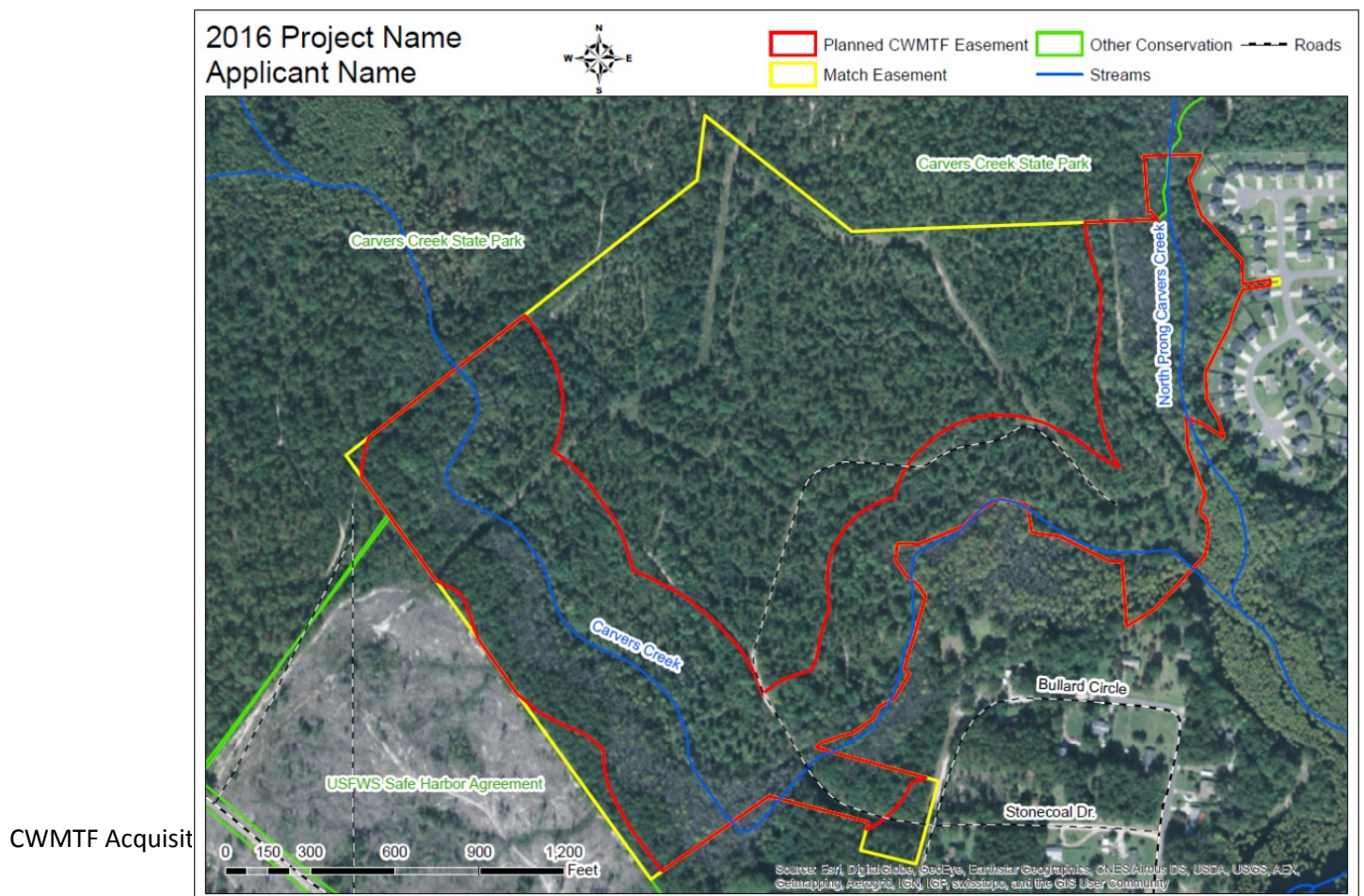Match Easement Boundary: Yellow (if this includes area that is not included in a CWMTF easement or state dedication)
Other Conservation: Green outline
Roads: Black
Streams: Blue
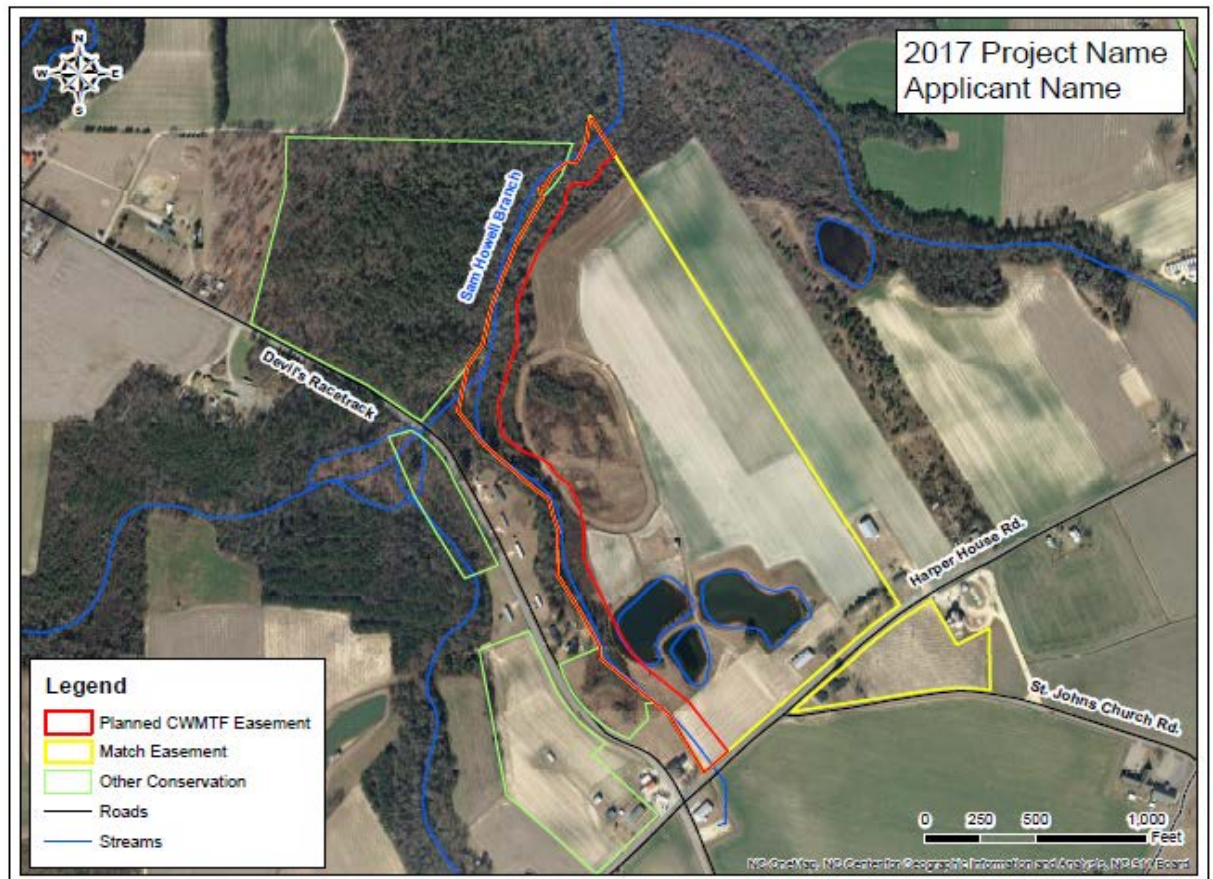Labels: Named streams, roads, and landmarks should be labeled.

Property Map example 1:

Property Map example 2:

Improvements map is necessary if there are existing or planned utilities, easements, improvements, etc. that need to be taken into account when the conservation easement is written. This map should focus on the easement area and all existing or planned utilities, easements, activities etc. that overlap the area of the CWMTF easement.
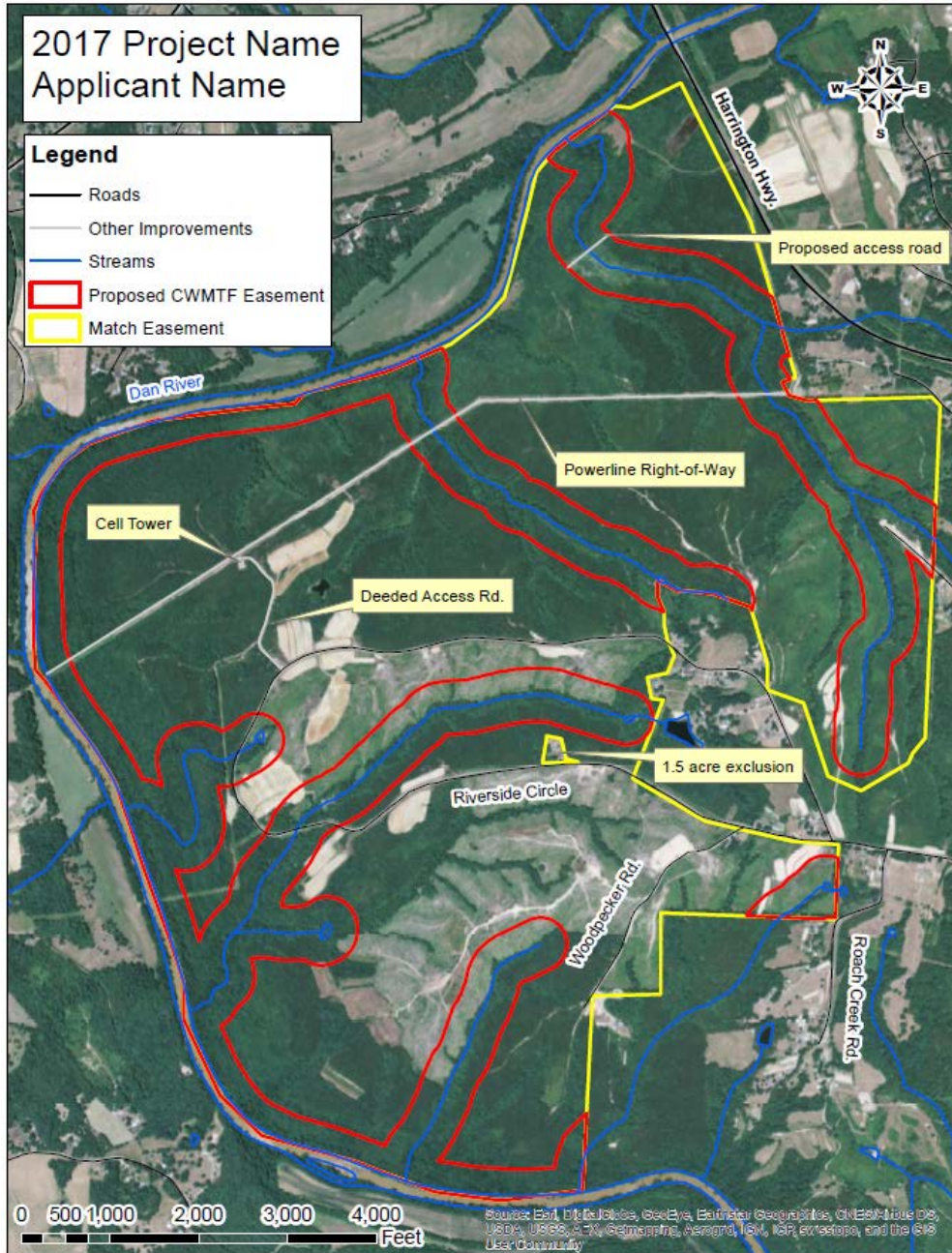
An aerial image is required if you are not able to use one as the background for the second map. Show the property and easement boundaries on the image.

Budget

The screenshots below are for your planning purposes only – you must complete the actual online budget within the GMS once you are logged on to the system.

The Transaction Costs and the Stewardship Endowment amounts will be automatically entered into the main budget table after you have completed the Transaction Cost Worksheet and the Stewardship Monitoring Estimate Worksheet.

	Item		Requested CWMTF Funds	Matching Funds	Total Cost
D001	D001 – Property Acquisition		$0.00	$0.00	$0.00
D002	D002 – Transaction Costs	?	$0.00	$0.00	$0.00
D011	D011 – Stewardship Endowment	?	$0.00	$0.00	$0.00
D012	D012 – Property Management Costs		$0.00	$0.00	$0.00
D013	D013 – Project Administration Costs		$0.00	$0.00	$0.00
D014	D014 – Addnl. Expense		$0.00	$0.00	$0.00
D015	D015 – Addnl. Expense		$0.00	$0.00	$0.00
D016	D016 – Addnl. Expense		$0.00	$0.00	$0.00
		Total	$0.00	$0.00	$0.00

	Number of Acres	Number of Acres	Total
Acres	0	0	
TOTAL COST PER ACRE	$0.00	$0.00	$0.00

Transaction Cost Worksheet

Transactions	Requested CWMTF Funds	Matching Funds	Total Cost
Appraisal	$0.00	$0.00	$0.00
Second Appraisal	$0.00	$0.00	$0.00
Surveys and Legal Description	$0.00	$0.00	$0.00
Phase 1 Environmental Site Asessment	$0.00	$0.00	$0.00
Baseline Documentation Report	$0.00	$0.00	$0.00
Title Insurance	$0.00	$0.00	$0.00
Legal Fees & Closing Costs	$0.00	$0.00	$0.00
Recording Fee	$0.00	$0.00	$0.00
Taxes	$0.00	$0.00	$0.00
Total	$0.00	$0.00	$0.00

Matching Resources Table   [Add Row]

Sources of Matching Funds - Name of organization providing matching funds, donated easements, etc.	Origin of Matching Funds (e.g Federal, State, etc.)	Matching Funds Applied to	Amount	Funds Committed as of Application	
	Choose ▾		$0.00	Choose ▾	X
		Total Matching Funds	$0.00		

Stewardship Monitoring Estimate

Stewardship Monitoring Estimate			
STAFF TIME TO MONITOR SITE (Salary and Benefits)	Quantity	Rate	Cost
a) Staff time prior to visit - Includes landowner contact & file review	0	$0.00	$0.00
b) Staff time to monitor easement - includes travel, discussion with landowner, onsite monitoring, photos, reposting boundary markers.	0	$0.00	$0.00
c) Staff time post visit - includes completing report, submitting documentation	0	$0.00	$0.00
d) Post monitoring activities- includes activities related to enforcement of minor violations. Only if authorized in advance.	0	$0.00	$0.00
		Total Staff Time	$0.00
OTHER MONITORING EXPENSES	Quantity	Rate	Cost
a) Travel cost for monitoring visits - Reimbursement per mile (per IRS)	0	$0.00	$0.00
b) Boundary marking materials- tape, paint, signs, etc.	0	$0.00	$0.00
c) Post Monitoring materials - Includes items such as additional signage, fence, trees, etc. Subject to CWMTF board approval.	0	$0.00	$0.00
		Total Other Expenses	$0.00
		Total ALL Expenses	$0.00
TOTAL ACREAGE TO BE MONITORED WITH THESE FUNDS - DOES NOT INCLUDE ADJACENT ACRES NOT UNDER STATE HELD EASEMENT			
		STEWARDSHIP ENDOWMENT (ANNUAL Total x 25)	0