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CLCC's Transaction Assistance Grant (TAG) Program

Instructions: Please read the "Program Overview" and "Evaluation Criteria" before completing this application. Please submit completed applications via email to Yaw Darko at yodarko@ctconservation.org. Contact Yaw to discuss your project before submitting an application.

PART 1: PROGRAM OVERVIEW

Summary

The Transaction Assistance Grant (TAG) program seeks to accelerate the pace of land conservation by providing financial assistance to land trusts for transaction-related project costs. TAG responds to immediate conservation needs and is designed to get funding on the ground efficiently and effectively.

Eligibility Requirements

- Applicant is a 501(c)3 nonprofit organization with a mission dedicated to land conservation in CT.
- Project is located within CT and can be a purchase, bargain-sale, or donation of any conservation easement or fee property, to be held by the applicant and protected *in perpetuity*.
- Applicant is a current member of CLCC.

Eligible Transaction Expenses

CLCC recognizes that there are many transaction-related expenses that land trusts incur when conserving a property. The TAG program is available to help conservation organizations offset the cost of the following expenses:

- Appraisal Work (Appraisal, Appraisal Review, Appraisal Update)
- Title Work (Title Search, Title Certificate, Title Insurance)
- Environmental Site Assessments (Phase I and Phase II ESAs)
- Surveys
- Recording Fees

CLCC also recognizes that these transaction-related expenses can range in function, scope, accuracy-level, and cost. CLCC expects TAG applicants to select the lowest-cost option(s) that is best suited for the project and expects applicants to justify their request in the application.

Example: If a conservation project is being submitted for OSWA or Highlands funding, one can easily justify the need for an A-2 survey and a Yellowbook appraisal - both are requirements for the OSWA and Highlands grant programs. For conservation projects not being submitted for state/federal funding, a B-class

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survey and a qualified/restricted appraisal may be perfectly sufficient and will come with a much lower price tag.

Ineligible Costs

Expenses not listed above are ineligible for TAG grants. This includes legal fees, staff time/salaries, stewardship costs, stewardship endowment, management plans, baseline documentation reports, etc.

Grant Application Process

Applications for TAG grants will be accepted monthly, with applications being due on the last day of a given month as long as funds are available (**see application table below**). Applicants must have completed the reporting requirements for any previous TAG grants prior to submitting a new TAG application.

CLCC seeks applications for projects that have a high likelihood of success. Strong applications will provide evidence of landowner commitment, such as a letter of intent, signed purchase and sale agreement, option agreement, or other evidence. Strong applications will also demonstrate fundraising progress towards an agreed upon purchase price. Applicants should be able to justify the need for a given transaction expense at the time of the application, and in relation to the timeline/progress of the project.

Within two weeks of the application due date, applicants will be notified of a funding decision. CLCC may elect to award full, partial, or no funding.

Multiple Expenses & Multiple Applications

Land trusts are encouraged to apply for the transaction expenses that are necessary for their conservation projects. Applicants may apply for multiple transaction expenses within the same grant application, so long as they anticipate incurring (**services rendered, invoiced, and paid**) those expenses during the 6-month grant period.

Upon completion of all reporting requirements, applicants may reapply for other transaction expenses, so long as they remain within the \$20,000 cap described in the "Grant Amounts" section, below. Applicants may have only one active application/grant at any given time.

Example: A land trust may wish to apply for TAG to assist with appraisal costs. Once the appraisal is completed and a purchase price agreed upon with the seller (and TAG reporting requirements met), the applicant can again apply to TAG to assist with a title search and survey costs (so long as the sum of the requested amounts does not exceed \$20,000).

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Application Due Dates

Application deadline	Notification date	Date by which all expenses must be incurred and reporting requirements fulfilled
January 31, 2025	February 14, 2025	July 31, 2025
February 28, 2025	March 14, 2025	August 31, 2025
March 31, 2025	April 14, 2025	September 30, 2025
April 30, 2025	May 14, 2025	October 31, 2025
May 31, 2025	June 16, 2025	November 30, 2025
June 30, 2025	July 16, 2025	December 31, 2025
July 31, 2025	August 14, 2025	January 31, 2026
August 31, 2025	September 14, 2025	February 28, 2026
September 30, 2025	October 14, 2025	March 31, 2026
October 31, 2025	November 17, 2025	April 30, 2026
November 30, 2025	December 15, 2025	May 31, 2026
December 31, 2025	January 14, 2026	June 30, 2026

Grant Amounts

Applicants are expected to submit an estimate, quote, or other documentation to substantiate their grant request. Funding allocations will be based on these documents.

For the 2025 TAG cycle, no more than \$20,000 will be awarded to any single applicant. For land trusts with service areas spanning more than one municipality, this \$20,000 maximum applies to each municipality in which the land trust operates (i.e. regional land trusts may receive up to \$20,000 in one municipality, complete that grant's reporting requirements, and then apply for up to \$20,000 in another municipality, all within the 2025 TAG cycle).

Match Requirements

A 20% cash match is required for all applications unless the conservation project is part of a municipal, state, or federal conservation funding application (e.g., OSWA, CCPP, Highlands, etc.). Higher levels of match are looked upon favorably. Please be sure to note this match in your application.

Grant Award Process

If awarded a TAG grant, CLCC will disburse payment equal to 50% of the grant award after receiving:

- A signed grant agreement; documentation of a board resolution that authorizes the organization to enter into the grant agreement; and a completed IRS W9 Form.

The applicant then has six months (from the application due date) to exhaust the award and complete the reporting requirements. CLCC will disburse the remaining 50% of the grant award upon receipt of:

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- All relevant invoices; proof of match (if required); proof of payment (e.g. copy of check and/or bank statement).

Any funds not expended during the 6-month grant period must be returned to CLCC. Completing the conservation project (i.e., closing on the property) is not a requirement for receiving a TAG award, though failure to complete the project will be considered should the applicant apply for future CLCC-administered grants.

Expenses may not be incurred (**services rendered, invoiced, and paid**) before the application deadline for which the land trust is applying for funds. For example, if a land trust submits an application for funding for an appraisal by January 31, 2025, it is expected that the cost of that appraisal will be incurred sometime between January 31, 2025 and July 31, 2025.

Other Requirements

CLCC must be notified when the project closes (within one month of closing) and must be acknowledged on any project related announcements/publications.

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PART 2: APPLICATION

Organization Information

Name:

Address:

Contact Person Name/Title:

Contact Person Phone Number:

Contact Person Email:

Annual Operating budget:

Statement of financial position (balance sheet) - *preferably audited*. Submit with application.

CLCC member: Yes. No. Accredited: Yes. No. Applying.

Terrafirma Coverage: Yes. No.

Project Description

Project Name:

Location:

Acreage:

Protection Method: Easement. Fee Ownership.

Conservation Values (Please provide answers to the questions below, as well as any additional information that would be helpful in our evaluation process): **75 words maximum for each question (answers can be a bulleted list).**

How will this project benefit your community and/or contribute to climate resiliency?

Does the project expand existing open space and/or trails or greenways?

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Does the project serve an area with limited access to nearby open space? Specify if property is located in or within a 10-minute walk to an environmental justice community, distressed municipality or target investment community?

Does the project support local, state, regional, federal or other conservation goals and plans? Specify which plans.

Does the project conserve important wildlife habitat, core forests, or other areas of ecological importance?

Project Partners (if any; briefly describe their role):

Project Status/Timeline

Project Start Date:

Anticipated Project Closing Date:

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Project Readiness/Likelihood of Success:

*(Provide explanation and evidence showing that this land conservation project will progress towards a successful conclusion and that any awarded funds will be spent within the eligible grant period). **100 words maximum.***

Attach documentation from the list below, or other evidence that project is likely to proceed and succeed:

- *Letter from landowner*
- *Letter of intent or memorandum of understanding*
- *Purchase and sale agreement*

Please describe why the expense you are applying for is needed at this moment and not further on in the project's timeline/progression. **100 words maximum.**

Project Budget

Is this acquisition a donation, bargain sale, or fair market value? If it is not a donation, what is the agreed upon purchase?

Purchase Price:

Acquisition Funding Sources: Check all that apply and indicate the amount of funding being sought, awarded, or raised.

OSWA:

Highlands:

CCPP:

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Municipal:

Private Funds/Fundraising:

Other Funding:

Transaction Expenses

Which specific costs are you seeking funding for? *Fill in the budget table accordingly.*

Eligible Transaction Expenses	Anticipated/Actual Costs	Anticipated Expenditure Date (mm/dd/yyyy)	Match Funds (if applicable)	Funding Request
Appraisal				
Title Search				
Environmental Assessment				
Survey				
Title Certificate				
Title Insurance				
Recording Fees				
Total				

Financial Justification: (Please provide justification to support the requested amount).
100 words maximum.

Additional Comments:

Additional Supporting Materials:

- List of Board of Directors, including names and professional affiliation.
- Project aerial map with site outline.
- Proposed scope of work/services if applying for appraisal, survey, and environmental assessment transaction costs.

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PART 3: EVALUATION CRITERIA

Applicant Details

1. Applicant meets all eligibility criteria.
No=Application is Denied Yes=Application is Reviewed
2. Applicant demonstrates sufficient organizational capacity and commitment to completing the project.
0=No 1=Partial 2=Yes
3. Applicant is an accredited land trust.
0=No 1=Applying 2=Yes
4. Applicant has terrafirma insurance.
0=No 2=Yes

Project Details

5. Project has a high likelihood of success. Demonstrated by a purchase and sale agreement, letter from landowner, close to full funding for acquisition, etc.
0=No 1=Partial 2=Yes
6. Applicant has justified their funding request and demonstrated a complementary need for the requested funding. Demonstrated by evidence for estimated transaction costs, shortfall in overall project budget, and/or evidence of insufficient operating or reserve funds.
0=No 1-4=Partial 5=Yes
7. Expenses will be incurred in the 6-month grant period.
0=No 1=Partial 2=Yes
8. Project will benefit the community and/or aligns with Local, State, Regional, Federal, or other conservation goals or plans, including climate resiliency.
0=No 1=Partial 2=Yes
9. Project expands existing open space and/or extends trails or greenways.
0=No 1=Partial 2=Yes
10. Project serves an area with limited access to nearby open space.
0=No 1=Partial 2=Yes
11. Project conserve important wildlife habitat, core forests, or other areas of ecological importance
0=No 1=Partial 2=Yes

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12. Project will be completed in collaboration with another conservation organization or extends across town boundaries.

0=No 2=Yes

13. Project is being (or is already) submitted for municipal, state, or federal funding (i.e. OSWA, Highlands, CCPP, etc.).

0=No 2=One Source 4=Two Sources 5=Three or More Sources

14. Land trust match for TAG is greater than the minimum required.

0=No 2=Yes

15. Project has a high degree of innovation, creativity, and/or urgency.

0=No 1=Partial 2=Yes