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**CLCC's Transaction Assistance Grant (TAG) Program**

**Instructions:** Please read the "Program Overview" and "Evaluation Criteria" before completing the application. Applications must be submitted using the online application form. Contact Yaw Darko at [yodarko@ctconservation.org](mailto:yodarko@ctconservation.org) to discuss your project before submission.

**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.*

**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.

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**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).*

Applicants requesting funding for different transaction-related expenses on projects that have already received an award during the funding year must speak with Yaw prior to submitting a new application.

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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, 2026	February 16, 2026	July 31, 2026
February 28, 2026	March 16, 2026	August 31, 2026
March 31, 2026	April 14, 2026	September 30, 2026
April 30, 2026	May 14, 2026	October 31, 2026
May 31, 2026	June 15, 2026	November 30, 2026
June 30, 2026	July 14, 2026	December 31, 2026
July 31, 2026	August 17, 2026	January 31, 2027
August 31, 2026	September 14, 2026	February 28, 2027
September 30, 2026	October 14, 2026	March 31, 2027
October 31, 2026	November 16, 2026	April 30, 2027
November 30, 2026	December 14, 2026	May 31, 2027
December 31, 2026	January 14, 2027	June 30, 2027

**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 this funding year, no single applicant may receive more than \$20,000. For land trusts operating in multiple municipalities, this \$20,000 limit applies per municipality. In practice, a regional land trust may receive up to \$20,000 in one municipality, complete the associated reporting requirements, and subsequently apply for up to \$20,000 in another municipality within the same funding year.

**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); and 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 applies by January 31, 2026 for funding to cover an appraisal, the appraisal must happen after that date. The work should take place, and the costs should be billed and paid between January 31, 2026 and July 31, 2026.

**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: 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. Strong applications show a clear plan for completing the project and evidence of the organization's commitment (e.g., board support, dedicated project leadership, and a track record of completing similar projects).  
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 clearly explains why TAG funding is needed and provides evidence (e.g., cost estimates, funding gap in project budget, and/or evidence that current operating or reserve funds are insufficient to cover costs).  
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 aligns with local, state, regional, federal, or other conservation goals or plans.  
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 conserves 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 (e.g., OSWA, Highlands, CCPP, etc.).

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

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

0=No      1=Partial ("equal to")      2=Yes

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

0=No      1=Partial      2=Yes