



EXECUTIVE OFFICE OF ENERGY & ENVIRONMENTAL AFFAIRS

Kathleen A. Theoharides, Secretary
Grant Announcement

BID ENV 21 DCS 03
Dated: March 27, 2020

Conservation Partnership Grant
FY 21

I. GRANT OPPORTUNITY SUMMARY:

A. PROPOSALS SOUGHT FOR: Financial assistance to non-profit 501(c)(3) organizations and conservation districts for the purchase of conservation land.

B. OVERVIEW AND GOALS: The Executive Office of Energy and Environmental Affairs (EEA) protects, conserves, and restores the natural resources of the Commonwealth. To fulfill this mission, Kathleen A. Theoharides, Secretary of EEA, makes available funding for the FY 2021 Conservation Partnership Grant Program. This program provides funding to assist non-public, not-for-profit corporations and conservation districts in acquiring and holding interests in lands suitable for conservation or recreation purposes.

The Conservation Partnership Grant Program is a component of the Baker Administration's goal of providing outdoor recreational opportunities to every Massachusetts resident. This BID is part of the Administration's efforts to permanently preserve highly valuable natural resources within the Commonwealth. It is a reimbursement program.

C. ELIGIBLE PROJECTS:

- 1) Land or a conservation restriction (CR) purchased by an eligible Applicant
 - 2) Due diligence for land or a conservation restriction gift donated to an eligible Applicant
- See further detail on eligible projects in Section 2B.

D. ELIGIBLE APPLICANTS: This BID is open to qualified IRS 501(c)(3) organizations that have been formed for one of the purposes described in Section 4 of Chapter 180 of the General Laws. An organization must have 501(c)(3) status at the time an application is submitted. Municipalities are not eligible for funding. (See further detail on eligible applicants in Section 2A.)

E. APPLICATION DEADLINE: **Monday, July 20, 2020 at 3:00 pm** (See further detail on deadlines and grant program calendar in Section 4).

F. FUNDING AVAILABILITY: The maximum grant award for a single acquisition project is \$85,000; for due diligence for gifts, the maximum award for a single project is \$10,000. Not more than 10% of available funding will be allocated to projects for due diligence. The maximum reimbursement amount available for a single project is 50% of the total eligible project cost up to the grant award maximum of \$85,000. Exceptions may be made at the Secretary's discretion. There is no guarantee that monies will be awarded (see further detail on Funding Availability in Section 2C).

G. NON-STATE FUNDING REQUIREMENT: Applicants selected to receive grant funding must use funds from non-state sources that total to at least double the grant request (i.e., the project budget must show funds from non-state sources for at least twice the grant amount requested from the Applicant and the final grant reimbursement amount will be based on multiplying the total of canceled Applicant checks [or other proof of

payment] by 50%). Approved expenditures must not be spent until after the selected Applicant has an executed contract with the Commonwealth. Selected applicants for all project types must convey an appropriate perpetual conservation restriction to the municipality in which the project is located, a federal or state agency, or a not-for-profit corporation, or combination of these entities. All projects must provide appropriate public access. (See further detail on budget requirements in Section 2D.)

H. TOTAL ANTICIPATED DURATION OF CONTRACT(S): Contracts issued pursuant to this BID must expend 100% of costs associated with the approved project on or before June 30, 2021 in order to be eligible for reimbursement (see further detail on anticipated duration of contract(s) in Section 2F).

I. REGULATIONS, STATUTES, OR AUTHORIZATION GOVERNING THIS GRANT PROGRAM: Subject to 815 CMR 2.00, this grant program provides funding to assist non-public, not-for-profit corporations and conservation districts in acquiring interests in lands suitable for conservation or recreation purposes as authorized in Chapter 286 of the Acts of 2014. (See further detail in Attachment C.)

J. CONTACT INFORMATION:

Melissa Cryan
Executive Office of Energy and Environmental Affairs
100 Cambridge Street, 9th Floor
Boston, MA 02114
(617) 626-1171
melissa.cryan@mass.gov
<https://www.mass.gov/grant-programs-offered-by-the-division-of-conservation-services>

2. Performance and Contract Specifications

A. ELIGIBLE APPLICANTS:

- This BID is open to qualified IRS 501(c)(3) organizations that have been formed for one of the purposes described in Section 4 of Chapter 180 of the General Laws.
- Multiple contracts may be awarded to the same applicant under this BID. Applicants may choose to package several adjacent landholdings into one application. Unrelated, separate landholdings must be submitted as individual applications.

B. ELIGIBLE PROJECT(S)/SCOPE(S) OF WORK:

EEA seeks to further the conservation of suitable conservation and recreation land so that outdoor recreational opportunities are available to every Massachusetts resident. Projects that allow for multiple recreational opportunities, including hunting, involve lands in BioMap2, comprise rare ecotypes or habitats, or that are large and abut other protected lands are preferred. Projects that protect a State Priority Preservation Area as shown on the South Coast Rail Corridor Plan, Merrimack Valley Land Use Priority Plan, or the 495/MetroWest Development Compact Plan, or other regional plan as they become available (if applicable) are also preferred. See Executive Order No. 525.

Land that is already permanently protected through Article 97 (e.g., through an EEA grant program, Conservation Restriction, Watershed Preservation Restriction, or Agricultural Preservation Restriction) is not eligible for funding. Lands enrolled in Chapter 61, 61A, or 61B are not classified as permanently protected land and are eligible to receive funding. The Applicant must apply for the interest in land that they plan on holding in perpetuity.

Types of eligible projects are:

1.) *Land or conservation restriction purchased by an eligible Applicant*

An eligible Applicant may request grant funding for reimbursement of approved acquisition and due diligence costs associated with the purchase of land (fee simple title) or of an interest in land (conservation restriction). Conversion of a term-limited CR to a permanent CR is eligible for funding.

2.) Due diligence costs for acquisitions or gifts to an eligible Applicant

An eligible Applicant may request grant funding for reimbursement of approved due diligence costs associated with a land or conservation restriction gift being donated to the Applicant or for the due diligence costs associated with the acquisition of land by an Applicant.

NOTE: Preservation of Agricultural Land: Executive Order 193 discourages the irreversible conversion of the Commonwealth's productive agricultural land base. State grants shall not be used to encourage the irreversible conversion of agricultural land to other uses when feasible alternatives are available. In the event that all feasible alternatives have been explored, and the conversion of suitable agricultural lands to non-agricultural use, such as habitat, remains the only feasible alternative to protection of open space, a mitigation plan must be developed to be eligible for reimbursement under a state grant. Projects that would convert any prime agricultural lands should consult with the Department of Agricultural Resources at (617) 626-1700 prior to submitting an application.

C. FUNDING AVAILABILITY, BUDGETING GUIDELINES & ALLOWABLE EXPENDITURES:

The maximum award under this grant program is \$85,000. Applicants must submit the appropriate type of appraisal (see Section 3B), the estimated total eligible project cost, and a specific grant request as part of the application package. Contract awards are not to exceed **50% of the total eligible project cost** with a maximum grant request and award of \$85,000.

Reimbursable project costs:

Eligible expenses occur during the grant recipient's contract period, which begins when EEA signs a Standard Contract with a selected Applicant (the contract execution date), and ends at the close of business on June 30, 2021. Expected date of contract execution is about 120 days from the application deadline. The grant award maximum is 50% of the eligible expenses shown below that are expended during the contract period as shown through canceled Applicant checks, or other proof of payment, up to \$85,000.

Eligible expense categories:

- Title search
- Acquisition (appraised value or negotiated price, whichever is less)
- Baseline Documentation Report
- Chapter 21E assessment
- Survey
- Legal fees associated with the acquisition
- Recording fees

Ineligible expense categories:

Please note that this is not a complete list.

- Costs associated with preparation and submission of application in response to BID
- Staff salaries
- Trail construction
- Signage
- Stewardship or monitoring endowments
- Equipment or goods

Project cost calculations are subject to approval by EEA. Only project costs approved by EEA will be considered when grant awards are calculated. Only acquisition and due diligence costs approved by EEA and expended by the Applicant demonstrated by canceled Applicant checks, or other proof of payment, will be eligible for reimbursement.

Requirements for reimbursement of eligible expenditures:

The Conservation Partnership grant program is a **reimbursement** program. Applicants selected to receive grant funding must complete the approved project and expend 100% of costs associated with it on or before June 30, 2021, in order to be eligible for reimbursement.

Any expenses incurred prior to the execution of a contract with the Commonwealth will not be reimbursed.

Final reimbursement notes: Selected Applicants must provide actual cost documentation when filing for reimbursement for each approved project cost included as part of the final total eligible project cost. For acquisitions, EEA will use the actual purchase price OR the appraised value (supported by contracted appraisal(s) submitted by the Applicant as part of the application package), whichever is less. EEA will only reimburse expenses paid for through the Applicant's checking account.

All contracts shall be subject to available funding, whether through the appropriation and authorization of sufficient funds or the receipt of sufficient revenues. If available funding ceases for any reason, a contract shall be deemed under suspension and contract performance must halt. A contractor will not be entitled to compensation for any performance provided during the period of contract suspension. EEA may lift the suspension if available funding is received. In the absence of foreseeable available funding, EEA may terminate the contract.

D. BUDGET REQUIREMENT:

Applicants selected to receive grant funding must show the use of funds from non-state sources equal to at least double the grant award. The grant award will not exceed \$85,000 for acquisitions and \$10,000 for due diligence for gifts. Non-state funding sources include, but are not limited to, other grants from private or non-profit foundations and cash contributions from local partners or individuals. Applicants must provide documentation of the source and amount of funds. Funds from other state programs may not be used with this grant program. The final reimbursement amount will be determined by the receipt of canceled Applicant checks or other proof of payment.

E. PROJECT TERMS:

If awarded, all projects will be required to abide by the Standard Commonwealth of Massachusetts Terms and Conditions. All final contracts are subject to successful negotiation of a Final Scope of Services. EEA does not guarantee that any contracts may result from this BID, or that any particular funding amount will be awarded. It is anticipated that projects could commence soon after EEA's awards announcement. Awarded contracts will be reviewed during their course and, upon request by the Contractor, may be extended or otherwise amended at the sole discretion of EEA. Any extension granted will not necessarily change the monetary value of the contract.

F. ANTICIPATED DURATION OF CONTRACTS:

All contracts will end on June 30, 2021; land purchase and other reimbursable expenditures must occur on or before this date. Expected date of contract execution is about 120 days from the application deadline. Extension of the contract is at the sole discretion of EEA and is unlikely to occur.

G. DELIVERABLES AND OWNERSHIP:

Contracts executed under this BID must include conveyance of a conservation restriction to the municipality in which the project is located, a federal or state agency, or a not-for-profit corporation, or combination of these entities, as required by Chapter 286 of the Acts of 2014. **Conveyance of the conservation restriction (or**

partial interest) must be completed before reimbursement. Please allow adequate time for review and approval of the conservation restriction by the necessary parties (e.g. municipal officials, Secretary of Energy and Environmental Affairs, and/or appropriate state agency). Draft conservation restrictions must be submitted separately to EEA for review. Please note that in the case of a grant application for the acquisition of a CR or due diligence costs associated with a CR acquisition, the CR must be co-held by the Applicant and the municipality in which the land is located, a state agency, or another land trust. EEA representatives must be invited to any public events sponsored by the Applicant in celebration of a Conservation Partnership grant award.

H. REPORTING:

No interim reports are required.

I. INVOICING:

Applicants selected to receive grant funding will be required to provide the following documentation when filing for reimbursement:

- ☐ Reimbursement Billing Form and Project Cost Worksheet (provided once contract has been executed)
- ☐ Deed and/or executed and recorded conservation restriction (copies of recorded documents)
- ☐ Title certification (copy)
- ☐ Cancelled checks from the Applicant (both sides), wire transfer statements, bank statements, or attested statement of Treasurer indicating the amount of payment, date paid, associated check or transaction numbers, and authority of payment (copy)
- ☐ Conservation Restriction language that ensures appropriate public access (copy)
- ☐ GIS Data Entry Form (provided once contract has been executed)

3. Instructions for Application Submission

A. EVALUATION PROCESS:

A project Selection Committee composed of members of the Executive Office of Energy and Environmental Affairs staff will evaluate all applications. Once preliminary application review and rating is complete, the Selection Committee will develop comments and draft recommendations. These draft recommendations are subject to further review, including by EEA senior management and by the Secretary of EEA, prior to final approval.

Site inspections: Proposals will not be funded on a sight unseen basis. A member of the Selection Committee will contact you to schedule an inspection of the property. Recreational opportunities indicated as being provided by the project will be verified by the EEA representative conducting the site visit.

Evaluation criteria: Each Response will be scored using the following measures below. The detailed distribution of these points is included as Attachment B: Response Review Rating System.

1. Organizational Characteristics (16%)

- Applicant has proven ability to successfully acquire (via purchase and/or donation) fee or conservation restriction interests
- Applicant has proven capacity to carry out proper long-term stewardship of fee or CR interest
- Number of full-time equivalent staff
- Articles of incorporation specifically state permanent land protection, land conservation, recreation as one of its missions and specifies which land trust will hold its land should it go out of business

2. Water Resources (10%)

- Project includes frontage on a water resource or provides a buffer for a water resource

- Project helps protect an existing drinking water supply area
- Project is located over a medium or high yield aquifer

3. Land Protection (12%)

- Total acreage protected.
- Project abuts other protected open space. Non-adjacent properties connected by a river or stream do not count as abutting. Protected open space can include land enrolled in Chapter 61, 61A, or 61B; land protected by a Conservation Restriction, Agricultural Preservation Restriction, or Watershed Preservation Restriction; Article 97 land; or land owned by a non-profit organization for conservation or recreation purposes.
- Project is within a designated Priority Preservation Area as shown on the South Coast Rail Corridor Plan, Merrimack Valley Land Use Priority Plan, or the I-495/MetroWest Development Compact Plan, or other regional plan as they become available (if applicable) are also preferred. See Executive Order No. 525.

4. Biodiversity and Natural Resource Protection (16%)

- Project lies within or abuts Natural Heritage and Endangered Species Program BioMap2 core habitat or critical natural landscape
- Project is considered to be resilient for climate change, as it demonstrates landscape complexity and permeability/connectivity
- How significantly project's resource value would be impacted by development

5. Working Farms and Forests (5%)

- Majority of the project parcel(s) is enrolled in Chapter 61 or 61A, Forest Stewardship program, Farm Viability program, or Forest Viability program
- Project parcel will continue in active management

6. Recreational Opportunities (27%)

- Project will provide public recreational opportunities, with preference given to those parcels that allow hunting
- How significantly project's recreational value would be impacted by development
- Project will provide recreational opportunities to residents that currently are lacking them
- Project will advance goals, objectives, or action plan items stated in the community's *current* Open Space and Recreation Plan
- Project will advance goals, objectives, or action plan items stated in the Statewide Comprehensive Outdoor Recreation Plan

7. Overall Project Quality and Importance (14%)

- Overall quality and importance of the proposed project, including complying with Executive Order 525 Implementation of the South Coast Rail Corridor Plan, Merrimack Valley Land Use Priority Plan, or the I-495/MetroWest Development Compact Plan, or other regional plan as they become available (if applicable) are also preferred. See Executive Order No. 525, and if the project is located in an area with Environmental Justice populations.

B. APPRAISAL REQUIREMENTS:

1.) Land or conservation restriction purchased by an eligible Applicant

Applications for projects that involve the purchase of land or a conservation restriction must **include the appropriate type of appraisal with the application:**

- A. *Parcels with an estimated total project cost equal to or greater than \$170,000:*
One full narrative appraisal by a real estate appraiser certified or licensed pursuant to M.G.L. c. 112, and dated no earlier than one year prior to the application submission deadline.
- B. *Parcels with an estimated total project cost less than \$170,000:*
One narrative appraisal OR one contracted market analysis OR one contracted opinion of value, completed by a real estate appraiser certified or licensed pursuant to M.G.L. c. 112, and dated no earlier than a year prior to the application submission deadline.

NOTE: The Applicant or one of the Applicant's project partners must be the client for the appraisal, market analysis, or opinion of value. The owner of the property cannot be the client and cannot donate money to cover the cost.

For projects that involve the purchase of land or a conservation restriction, **applications lacking the appropriate type of appraisal will be rejected.**

2.) Land or a conservation restriction gift donated to an eligible Applicant

Applications for projects that involve a land or conservation restriction donation to the Applicant **DO NOT require an appraisal**, market analysis, or opinion of value.

C. APPLICATION SUBMISSION INSTRUCTIONS:

Applications must be received in hard copy by **3:00 pm, Monday, July 20, 2020**. Any application received after the deadline will be rejected. A postmark will not be accepted for verification of date of submission. Applications will **not** be accepted by fax or email. The outside of the package should be marked BID ENV 21 DCS 03. Submit **one original** (clearly identified as such) and **two paper copies** of the application package to:

Melissa Cryan
RE: BID ENV 21 DCS 03
Executive Office of Energy and Environmental Affairs
100 Cambridge Street, 9th Floor
Boston, MA 02114

A complete application package includes a completed Conservation Partnership Application Form (Attachment A). Failure to provide any of the materials requested in the application package may result in the disqualification of the Proposal.

Help reduce waste: *Print double-sided wherever possible. Use the least packaging necessary to ensure good organization.*

Public records: Please note that all responses and information submitted in response to this BID are subject to the Massachusetts Public Records Law, M.G.L. c. 66, s. 10, and to c. 4, s. 7, ss. 26. Any statements in submitted responses that are inconsistent with these statutes, including marking of information as confidential, shall be disregarded. Please do not submit any information that the Applicant may not wish to disclose publicly, such as home addresses or personal telephone numbers, social security numbers, or other similar information.

D. ADDITIONAL DOCUMENTATION:

If selected, the following forms will be required to execute a contract. They are available from the Commonwealth's Operational Services Division website (<https://www.mass.gov/lists/osd-forms>) and Respondents are encouraged to review these forms prior to submission of a BID.

- Commonwealth Terms and Conditions

- Commonwealth W-9 Request for Taxpayer Identification Number and Certification
- Contractor Authorized Signature Verification Form (both sides)
- Authorization for Electronic Funds Payment (attach cancelled check)

Documentation required for reimbursement:

If selected, the Respondent will be required to submit the following additional forms to be reimbursed:

- Reimbursement Billing Form and Project Cost Worksheet (provided once contract has been executed)
- Deed and/or conservation restriction, as executed and recorded (copy)
- Title certification (copy)
- Recent survey (copy)
- Cancelled checks from the Respondent (both sides), wire transfer statements, bank statements (copies);
OR attested statement of Treasurer indicated the amount of payment, date paid, associated check or transaction numbers, and authority of payment, or other proof of payment
- Conservation restriction language that ensures appropriate public access (copy)
- GIS Data Entry Form (provided once contract has been executed)

4. Deadlines and Procurement Calendar

A. RELEASE OF BID: March 27, 2020

B. INFORMATION SESSION: No information session will be held for this BID.

C. APPLICATION DUE DATE: Monday, July 20, 2020, 3:00 pm

D. ESTIMATED AWARD DATE: Awards are estimated to be announced on or about 120 days after the application deadline, with contract negotiations to begin immediately thereafter. Please note this is an estimated timeframe, subject to change based on availability of funds and other factors.

E. ESTIMATED CONTRACT START DATE: Notwithstanding any verbal representations by the parties, or an earlier start date listed in the Standard Contract Form, and only after an award is issued and a final scope of services has been negotiated, the effective start date of a contract shall be the latest of the following dates: the date the Standard Contract Form has been executed by an authorized signatory of the contractor and the procuring department; the date of secretariat or other approval(s) required by law or regulation; or a later date specified in the Standard Contract Form. The estimated start date for contracts resulting from this BID is January 15, 2021, subject to change as noted above.

5. Miscellaneous

A. TYPE OF PROCUREMENT: Grant

B. USE OF THIS PROCUREMENT BY SINGLE OR MULTIPLE DEPARTMENTS: This BID is single department procurement. All contracts awarded under this BID will be utilized solely by EEA.

C. REQUEST FOR SINGLE OR MULTIPLE CONTRACTORS: This BID will result in multiple contractors.

D. BID DISTRIBUTION METHOD: This BID has been distributed electronically using the Commbuys system. It is the responsibility of every Applicant to check Commbuys for any addenda or modifications to a BID to which they intend to respond. The Commonwealth of Massachusetts and its subdivisions accept no liability and will provide no accommodations to Applicants who fail to check for amended BIDs and submit inadequate or incorrect responses. Potential Respondents are advised to check the “last change” field on the summary page of BIDs for which they intend to submit a response to ensure they have the most recent BID files.

Respondents may not alter BID language or any BID component files. Those submitting a proposal must respond in accordance to the BID directions and complete only those sections that prompt a Respondent for a response. Modifications to the body of this BID, specifications, terms and conditions, or which change the intent of this BID are prohibited. Any unauthorized alterations will disqualify response.

E. LIST OF ATTACHMENTS:

- A. Application Form
- B. FY 21 Conservation Partnership Grant – Response Review Rating System
- C. Chapter 286 of the Acts of 2014

Attachment A

APPLICATION FORM

**FY 21 CONSERVATION PARTNERSHIP GRANT PROGRAM
Executive Office of Energy and Environmental Affairs**

SUBMIT: One original application form with supporting documentation and two paper copies of the completed application and supporting documentation.* Please help reduce waste—print double sided and use the minimum packaging necessary for good organization.

(*NOTE: Only ONE copy of the appraisal, market analysis, or opinion of value is needed)

DEADLINE: Monday, July 20, 2020, 3:00 pm

TO: Melissa Cryan
RE: BID ENV 21 DCS 03
Executive Office of Energy and Environmental Affairs
100 Cambridge Street, 9th Floor
Boston, MA 02114

| |
|---------------------------------|
| A. APPLICANT INFORMATION |
|---------------------------------|

Applicant Name: _____

Mailing Address: _____

City/Town: _____ State: _____ Zip: _____

Project Title: _____

Project Location (street address, including municipality): _____

Type of project: Acquisition Due diligence for gift

Requested grant amount: \$ _____

[→ **Attachment 8:** Articles of Incorporation and IRS 501(c)(3) letter, as well as a copy of your 2018 Massachusetts Annual Report as filed to the Secretary of State's office. Corporation must be formed for one of the purposes described in Section 4 of Chapter 180 of the General Laws.]

| |
|--------------------------|
| B. CONTACT PERSON |
|--------------------------|

Name: _____ Title: _____

Mailing Address (if different from above): _____

City/Town: _____ State: _____ Zip: _____

Email address: _____

Telephone: _____

C. ORGANIZATIONAL CHARACTERISTICS

1a.) How many acres of land does your Organization have under fee ownership? _____

1b.) How many acres of land does your Organization have under CRs? _____

For how many acres of CR land have Baseline Documentation Reports been prepared? _____

2a.) Does your organization have a Strategic Land Acquisition Plan? Yes No

2b.) Does your organization have Land Acquisition Guidelines? Yes No

3.) How do you finance stewardship, monitoring, and enforcement?

Annual Operating Budget Yes No

Segregated Stewardship & CR Monitoring Fund Yes No

Segregated CR Enforcement Fund Yes No

Other (explain): _____

What is your annual stewardship/monitoring budget? \$_____ Endowed? Yes No

4.) Does your organization have full-time stewardship or land management staff? Yes No

5.) If no staff, how do you maintain your properties? Volunteers Contract work

6.) How do you intend to maintain the property proposed for protection in this application?

7.) What is the total number of full-time equivalent staff employed by your organization?

0-2

3-5

6-7

8-10

More than 10

8.) Does your proposed project have board approval? Yes No

If no, when do you expect to receive it? _____

9.) Do your Articles of Incorporation specifically list permanent land conservation or habitat protection or recreation as one of your organization's goals? If yes, highlight the relevant passage in the Articles (Attachment 8).

Yes No

10.) Do your Articles of Incorporation specify a land trust that will receive your land should your organization go out of business? If yes, highlight the relevant passage in the Articles (Attachment 8). Yes No

D. PARCEL INFORMATION

Please complete a copy of this section (i.e. PARCEL INFORMATION) for each parcel that is part of this grant application.

1.) Total **Project Acreage**: _____

Total number of parcels (print off and fill out a copy of this page for each parcel): _____

2.) This **Parcel Information** form is being completed for:

A parcel or interest in a parcel to be **purchased**

Fee

CR

A parcel or interest in a parcel that will be **donated**

Fee

CR

3.) Parcel Information:

Owner(s): _____

Location: _____ Acres: _____
(municipality)

Street: _____

Assessors Sheet #: _____ Lot #: _____

Building(s) on the parcel? Yes No

If yes, please explain how they will be utilized (Buildings that remain must contribute to the conservation/recreation function of the property. Buildings that do not so contribute to the property should be removed.): _____

[→ **Attachment 3:** Copy of a USGS topological map that clearly shows parcel location. Include name and date of the USGS topo quad. If project involves multiple parcels, include one map that clearly shows the location of each parcel.]

4.) Encumbrances? Yes No If yes, what type? Mortgage Easement Lien(s)
Describe

5.) **Appraisal** – **If** the proposed project involves the purchase of land or a conservation restriction, please refer to the Appraisal Requirements (Section 3B) in the Request for Response to determine the type of appraisal that must be submitted with this application.

Please check one:

Full narrative appraisal

Market analysis

Opinion of value

Appraiser: _____

Valuation: \$ _____

Date of appraisal, market analysis, or opinion of value: _____

(NOTE: Appraisal, market analysis, or opinion of value can be dated **no earlier than one year prior** to the Application submission deadline)

[→ **Attachment 7:** One copy of the appraisal, market analysis, or opinion of value.]

All projects that receive funding through the Conservation Partnership grant program must convey a perpetual conservation restriction, or one-half interest, within the meaning of sections 31 and 32 of MGL Chapter 184, to the municipality in which the project is located, a federal or state agency, or a not-for-profit corporation, or combination of these entities. Please note that in the case of a grant application for the acquisition of a CR or due diligence costs associated with a CR acquisition, the CR must be co-held by the Applicant and an entity eligible to hold a CR.

6.) To what public agency/agencies or organization do you intend to convey a conservation restriction or partial interest therein (for projects in which only the CR will be acquired)?

Organization Name: _____

Contact Person: _____

Address: _____

Telephone: _____

Email Address: _____

[→ **Attachment 4:** Letter of commitment from the town or state agency (or both) or not-for-profit stating the intent to hold the conservation restriction]

E. PROJECT DESCRIPTION

[→ **Attachment 1: Project Narrative:** 2-3 pages]

1.) Using the Conservation Partnership Response Review Rating System (Appendix B) as a guide, please describe in a 2-3 page attachment the nature of your project. At a minimum, describe:

- a. The property(s) and property interest(s) to be acquired or donated
- b. The natural characteristics and ecological value of the property
- c. The proposed project's ability to protect or promote sustainable working lands
- d. The type of public recreational opportunities that will be available, especially those that go above and beyond to provide access to people with disabilities, and how public access will be assured
- e. The project's ability to advance objectives in the community's *current* Open Space and Recreation Plan (note: it is not sufficient to attach Goals and Objectives from the OSRP, some analysis is needed)
- f. The project's ability to advance objectives in the Statewide Comprehensive Outdoor Recreation Plan (<https://www.mass.gov/files/massachusetts-scorp-2017-for-submission.pdf>) (note: it is not sufficient to attach Goals and Objectives from the SCORP, some analysis is needed)
- g. The impact of development on the project parcel's resource and recreational value
- h. The expansion of recreational amenities provided by the parcel to the Commonwealth's residents
- i. The project's ability to protect a State Priority Preservation Area as shown on the South Coast Rail Corridor Plan, Merrimack Valley Land Use Priority Plan, 495/MetroWest Development Compact Plan or other regional plan as they become available (if applicable). See Executive Order No. 525.
- j. The organization's commitment to working with Native American tribes
- k. The project's location in or near an area with Environmental Justice populations

[→ **Attachment 2: Proposed Budget:** 1-2 pages]

- a.) An itemized list of estimated project costs
- b.) Estimated total project cost
- c.) Grant request amount
- d.) Description of the methods/sources of financing for the proposed project
- e.) Detailed timeline with the anticipated start and end date of each step needed to successfully complete your proposed project on or before June 30, 2020.

F. WATER RESOURCES

1.) Approximate percentage of property located 0-300 feet from the edge of an ocean, lake, pond, river, stream, or wetland:

- ☐ > 75.0%
☐ 51.0% - 74.9%
☐ 26.0% - 50.9%
☐ 1.0% - 25.9%
☐ 0%

2.) What is the approximate percentage of the project that lies within an existing drinking water supply area (i.e. Zone I/II or Zone A/B)?

- ☐ > 75.0%
☐ 51.0% - 74.9%
☐ 26.0% - 50.9%
☐ 1.0% - 25.9%
☐ 0%

3.) Is the majority of project located over a medium or high yield aquifer?

- ☐ The majority of project located over a high-yield aquifer
☐ The majority of project located over a medium-yield aquifer

☐ Neither

[→ **Attachment 3:** Map(s) showing the location of the project parcel(s) in relation to relevant water resources, existing drinking water supply areas, medium and high yield aquifers, and/or wetlands.]

G. LAND PROTECTION

1.) How many acres would this project protect?

- ☐ > 15.0 acres
- ☐ 11.0-14.9 acres
- ☐ 6.0-10.9 acres
- ☐ 2.0-5.9 acres
- ☐ < 2.0 acres

2.) Does the proposed project abut other protected open space?*

- ☐ Abuts >25.0 acres of protected open space
- ☐ Abuts 11.0-24.9 acres of protected open space
- ☐ Abuts 1.0-10.9 acres of protected open space

*Chapter 6I, 6IA, and 6IB lands are not considered protected open space

[→ **Attachment 3:** Map(s) showing the location of the project parcel(s) in relation to other protected open space.]

H. BIODIVERSITY AND NATURAL RESOURCE PROTECTION

1.) What percentage of the proposed project lies within or abuts Natural Heritage and Endangered Species Program (NHESP) BioMap2 core habitat or critical natural landscape?

- ☐ > 75.0% within core habitat
- ☐ 51.0%-74.9% within core habitat
- ☐ 26.0%-50.9% within core habitat
- ☐ 1.0%-25.9% within core habitat
- ☐ > 75.0% within critical natural landscape
- ☐ 51.0%-74.9% within critical natural landscape
- ☐ 26.0%-50.9% within critical natural landscape
- ☐ 1.0%-25.9% within critical natural landscape
- ☐ Abuts BioMap2 core habitat or critical natural landscape
- ☐ Neither lies within or abuts

2.) How resilient is the proposed project considered to be resilient for climate change? See the Resilient Mapping Tool at <http://maps.tnc.org/resilientland/>. List the numeric score below.

_____ SD

3.) How many acres of wetland are on the property? _____ acres

How many acres of upland are on the property? _____ acres

How many potential house lots are on the property? _____

[→ **Attachment 3:** Map(s) showing the location of the project parcel(s) in relation to BioMap2 habitats.]

I. WORKING FARMS AND FORESTS

1.) Is the majority of the project parcel(s) enrolled in any of the following programs and will continue to be once purchased? If yes, please indicate which program(s):

- ☐ Chapter 61 or active forest management
- ☐ Chapter 61A or active agriculture
- ☐ Forest Stewardship program
- ☐ Farm Viability program
- ☐ Forest Viability program

2.) Will the property continue, or begin, to have active forestry or agriculture?

- ☐ Yes
- ☐ No

If yes, explain:

[→ **Attachment 6:** Documentation to support your answer (e.g. a letter confirming enrollment in one of the above programs from the program administrator or documentation from town/city assessor's office).]

J. RECREATIONAL OPPORTUNITIES

1.) What public recreational opportunities will the project provide? (check which box best describes your project; use the space below to describe or clarify.) Please note that preference will be given to projects that permit hunting and provide opportunities for people with disabilities. *Recreational opportunities will be verified by the DCS representative during the site visit.*

- ☐ Trail-based activities (eg, walking, Nordic skiing, biking, horseback riding)
- ☐ Water-based activities (eg, canoeing, fishing, swimming, skating)
- ☐ Wilderness activities (eg, camping, hunting)

Describe/clarify:

2.) What is the protected open space per capita in the project's region? _____

3.) What other similar recreational opportunities are available in the area and at what distance? _____

4.) Will the proposed project advance priorities, goals, or objectives in the current local Open Space and Recreation Plan?

- ☐ Yes
- ☐ No

5.) Will the proposed project advance priorities, goals, or objectives in the Statewide Comprehensive Outdoor Recreation Plan?

- ☐ Yes
- ☐ No

6.) Will the proposed project advance a local or regional greenway plan or the South Coast Rail Corridor Plan, Merrimack Valley Land Use Priority Plan, 495/MetroWest Development Compact Plan, Metro North Plan, or CMRPC Plan?

- ☐ Yes
☐ No

[→ **Attachment 5:** Your narrative should include a written analysis of the OSRP and the SCORP and how it relates to this project; and/or relevant sections from a local or regional greenway plan or the South Coast Rail Corridor Plan, Merrimack Valley Land Use Priority Plan, or the 495/MetroWest Development Compact Plan, Metro North Plan, or CMRPC Plan to support your answers.]

K. CERTIFICATION STATEMENT

This application was prepared by:

Name: _____

Title: _____

Mailing Address: _____

City/Town: _____ State: _____ Zip: _____

Email address: _____

Telephone: _____ Fax: _____

To the best of my knowledge, the information and data which has been submitted to qualify for the FY21 Conservation Partnership Grant are true and correct.

Signed: _____ Date: _____

L. ATTACHMENT CHECKLIST

Please include the following supporting documentation and forms with your application:

- ☐ **Attachment 1:** Project narrative
- ☐ **Attachment 2:** Budget proposal, grant request, funding sources/methods, and project timeline
- ☐ **Attachment 3:** Maps, including:
 - USGS topographic map with parcel(s) outlined
 - Surrounding other protected open space (identify adjacent parcels)
 - Water resources (drinking water supply zones I/II or A/B; aquifers; proximity to wetlands, etc.)
 - BioMap2
 - Local or regional greenway plan
 - Nearby State Priority Development or Preservation Areas as shown on the South Coast Rail Corridor Plan, Merrimack Valley Land Use Priority Plan, or the 495/Metrowest Development Compact Plan (if applicable)
- ☐ **Attachment 4:** Letter of commitment from the municipality or state agency (or both) stating the intent to hold the conservation restriction
- ☐ **Attachment 5:** Copy of local or regional greenway plan to support the answers provided in Section E: "Project Description."

- ☐ **Attachment 6:** Documentation to support parcel enrollment in the Chapter 61 or 61A, Forest Stewardship program, Farm Viability program, or Forest Viability program.
- ☐ **Attachment 7:** Appraisal, market analysis, or opinion of value
- ☐ **Attachment 8:** Articles of Incorporation and IRS 501(c)(3) letter. Corporation must be formed for one of the purposes described in Section 4 of Chapter 180 of the General Laws. A copy of your 2019 Massachusetts Annual Report as filed to the Secretary of State's office.

Additional Forms required if selected for funding:

The following forms are available at the Commonwealth's Operational Services Division website
<https://www.mass.gov/lists/osd-forms>.

- ☐ Commonwealth Terms and Conditions
- ☐ Commonwealth W-9 Request for Taxpayer Identification Number and Certification
- ☐ Contractor Authorized Signature Verification Form
- ☐ Authorization for Electronic Funds Payment

Note: this form must be completed online.

Attachment B
FY 21 CONSERVATION PARTNERSHIP GRANT - RESPONSE REVIEW
RATING SYSTEM
100 TOTAL POINTS

I. Organizational Characteristics (16 points maximum)

- 1.) Applicant currently has under their care and control land under fee ownership and/or CR and has acquired the land through a planned process:
Yes = 1 pt
No = 0 pts
- 2.) Applicant has proven capacity to carry out proper future stewardship of fee or CR interest:
Yes = 2 pts
No = 0 pts
- 3.) Number of full-time equivalent (FTE) staff:
0-2 FTE = 6 pts
3-5 = 5 pts
6-7 = 4 pts
8-10 = 2 pts
- 4.) Articles of incorporation specifically state permanent land protection, land conservation, recreation as one of its missions
Yes = 4 pts
No = 0 pts
- 5.) Articles of Incorporation specifies a land trust that will receive land should the organization go out of business
Yes = 3 pts
No = 0 pts

II. Water Resources (10 points maximum)

- 1.) Approximate percentage of property located 0-300 feet from the edge of an ocean, lake, pond, river, stream, or wetland:
>75% = 4 pts

51% - 75% = 3 pts
26% - 50% = 2 pts
1% - 25% = 1 pt
0% = 0 pts

- 2.) Approximate percentage of project that lies within an existing drinking water supply area (i.e. Zone I/II or Zone A/B):

>75% = 4 pts
51% - 75% = 3 pts
26% - 50% = 2 pts
1% - 25% = 1 pt
0% = 0 pts

- 3.) Project is located over a medium or high yield aquifer:

51% - 100% = 2 pts
1% - 50.9% = 1 pt
0% = 0 pts

III. Land Protection (12 points maximum)

- 1.) Total acreage protected (via purchase and/or donation):

> 15 acres = 6 pts
11-15 acres = 5 pts
6-10 acres = 3 pts
2-5 acres = 2 pts
< 2 acres = 1 pt

- 2.) Proposed project abuts or links other protected open space:

Abuts >25 acres of protected open space = 6 pts
Abuts 11-25 acres of protected open space = 3 pts
Abuts 1-10 acres of protected open space = 1 pts

IV. Biodiversity and Natural Resource Protection (16 points maximum)

1.) Project lies within or abuts Natural Heritage and Endangered Species Program (NHESP) BioMap2 core or critical natural landscape:

>75% within BioMap2 core habitat or critical natural landscape = 6 pts

51%-75% within core habitat or critical natural landscape = 5 pts

26%-50% within core habitat or critical natural landscape = 4 pts

1%-25% within core habitat or critical natural landscape = 2 pts

Abuts = 1 pt

Neither lies within or abuts = 0 pts

2.) Is the proposed project considered to be resilient for climate change, as it demonstrates landscape complexity and permeability/connectivity?

Yes = 1, 2, 3, or 4 pts

No = 0 pts

3.) How significantly will the subject parcel's resource value be impacted by its development (rating determined based on how this application compares to others received)?

High impact = 6 pts

Medium impact = 3 pts

Low impact = 1 pt

V. Working Farms and Forests (5 point maximum)

1.) The majority of the project parcel(s) will remain (or be) enrolled in one or more of the following programs:

Chapter 6I or active forest management = 2 points

Chapter 6IA or active agriculture = 2 points

Forest Stewardship program = 1 point

Farm Viability program = 1 point

Forest Viability program = 1 point

2.) The project parcel will continue or begin active forest management or agriculture:

Yes = 2

No = 0

VI. Recreational Opportunities (27 points maximum)

1.) Project supports public recreational opportunities (especially those that go above and beyond to provide access for people with disabilities):

| | Yes (4pts) | Marginal (2pts) | No (0pts) |
|-------------------------------------------------------------|--------------------------|--------------------------|--------------------------|
| Education activities (eg, camps, walks) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Wilderness activities (eg, camping, hunting) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Trail-based activities (ie, hiking, biking, walking) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Water-based activities (eg, swimming, kayaking, fishing) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

2.) Does the project serve an under-served area for outdoor recreation (rating determined by the amount of protected open space per capita and how it compares to other applications received)?

High impact = 5 pts

Medium impact = 3 pts

Low impact = 1 pts

3.) Project meets priorities, goals, or objectives identified in the community's Open Space and Recreation Plan (OSRP)

Yes = 2 pts

No = 0

4.) Project meets priorities, goals, or objectives identified in the Statewide Comprehensive Outdoor Recreation Plan

Yes = 1, 2, 3, or 4 pts

No = 0

VII. Overall Project Quality and Importance (14 points)

1.) What is the overall quality and importance of the proposed project?

High = 10-14 pts

Medium = 5-9 pts

Low = 0-4 pts

Attachment C

Policies, Statutes, Legislation Guiding this Grant Program

Chapter 286 of the Acts of 2014

2000-7056... For the conservation partnership grant program to assist not-for-profit corporations and conservation districts defined in sections 19 to 24, inclusive, of chapter 21 of the General Laws, in acquiring interests in lands suitable for purposes of conservation or recreation; provided, that the corporation shall be formed for 1 of the purposes described in section 4 of chapter 180 of the General Laws and the corporation shall be considered an exempt organization within the meaning of section 501(c)(3) of the Internal Revenue Code; provided further, that grant funds shall be expended to reimburse an eligible corporation or conservation district for money expended by it in establishing a project approved by the secretary of energy and environmental affairs under this program in an amount that the secretary shall determine to be equitable in consideration of anticipated benefits from the project, but in no event shall the amount of the reimbursement exceed 50 per cent of the cost of the project; provided, however, that no reimbursement shall be made under this item to a corporation or conservation district unless a project application is filed by the corporation with the secretary setting forth the plans and information that the secretary may require and approved by the secretary, nor until the corporation or conservation district shall have certified, in a manner approved by the secretary, its ability to provide an amount equal to the total cost of the project, nor until the project has been completed, to the satisfaction of the secretary, in accordance with the approved plans; provided further, that all projects shall include the grant by the corporation or conservation district of an appropriate perpetual conservation restriction, within the meaning of sections 31 and 32 of chapter 184 of the General Laws, to the city or town in which the project is located, to be managed by either its conservation or its recreation commission, or a federal or state agency, or a not-for-profit corporation, or combination of these entities; provided further, that all projects shall provide appropriate public access as determined by the secretary; and provided further, that the secretary may adopt rules and regulations to carry out this item.