

Connecticut Land Trust Challenge Fund
Capacity Building Support Program

REQUEST FOR PROPOSALS

Proposal Deadline
June 8, 2009

Connecticut Land Trust Challenge Fund
Land Trust Alliance
P.O. Box 1797, 7 West Street
Litchfield, CT 06759
(860) 361-9310

To download request for proposal materials and
to get updated information about the program, visit
www.landtrustalliance.org/CT_ChallengeFund

PROGRAM OVERVIEW

The Land Trust Alliance (the Alliance) and the Connecticut Land Conservation Council (CLCC) are pleased to announce the **Connecticut Land Trust Challenge Fund (the Challenge Fund)**. The Challenge Fund provides technical assistance support services to enhance the capacity of Connecticut land trusts. The goal of the Challenge Fund is to build long-term strength and effectiveness of land conservation organizations in Connecticut and to advance land trust efforts to implement *Land Trust Standards and Practices* (visit www.landtrustalliance.org/learning/sp for more information on *Land Trust Standards and Practices*). The consultant-led services granted to land trusts may be applied toward a spectrum of capacity-building needs, including, but not limited to, strategic planning, enhancing stewardship practices, increasing fundraising skills, building new collaborations, improving volunteer management, or advancing community outreach. Land trusts that are members of Land Trust Alliance and CLCC operating in the state of Connecticut and that meet all other eligibility requirements are encouraged to apply.

The Land Trust Challenge Fund is not a grants program and no direct funding will be provided. Rather, the Challenge Fund awards direct consultant support for activities that build land trust capacity. Any non-consultant expenses associated with a proposed project are the sole responsibility of the land trust(s).

The Connecticut Land Trust Challenge Fund is made possible by the generous support of Northeast Utilities Foundation and The Hartford Foundation for Public Giving.

Program Awards

Individual land trust projects may receive up to \$10,000 in consultant-led support services. Up to \$20,000 may be awarded toward services for two or more land trusts working on a collaborative project. Total allocations in this award round will be \$60,000. All consultants will be contractors of Land Trust Alliance. Recruitment and selection of a consultant is the responsibility of the land trust(s). For more details, see **Obtaining Consultant Services** (page three).

Eligibility Requirements

Applicants meeting the following requirements are eligible for the Connecticut Land Trust Challenge Fund:

- Applicant is a Land Trust Alliance Member at the time of application and land conservation is the primary mission of the applicant organization(s).
- Applicant is a Connecticut Land Conservation Council Member at the time of application.
- Applicant(s) service area is located in Connecticut.
- Applicant is tax-exempt under Section 501(c)3 of the Internal Revenue Code.
- Applicant has adopted the revised *Land Trust Standards and Practices*.
- Applicants for a collaborative land trust project have provided documentation of an agreement to collaborate that includes a description of the purpose and is approved by all participating land trusts.

Eligible Project Categories

Projects should address one or more of the project areas below.

Note: Your project may differ considerably from the examples given. Applicants are encouraged to contact the Alliance or CLCC to discuss project ideas before submitting an application.

- **Strategic Land Protection:** Increase the quality of land protection projects to best advance a land trust's mission.
Example Project: Complete a strategic conservation planning process that identifies conservation priorities within the land trust's service area.
- **Land Stewardship:** Improve the land trust's ability to steward and defend their conserved lands.
Example Project: Train staff and/or volunteers in the development and completion of baseline documentation and annual monitoring reports.
- **Organizational Strength and Development:** Improve land trust governance and capacity for operating as an effective and ethically sound organization.
Example Project: Complete a 3-year strategic plan that reviews mission and identifies goals, strategies and action plans to advance the organization's development and effectiveness.
- **Fundraising:** Goal is to improve land trust's ability to raise the funds needed to achieve the organization's mission and sustain its operations over time.
Example Project: Increase organizational fundraising capacity and sustainability through development of a fundraising plan, coupled with board and staff fundraising training.
- **Leadership:** Assure that the land trust has board members and staff with the skills, passion and vision needed to successfully carry out its programs.
Example Project: Work with a consultant to develop a Board recruitment and training program that addresses board roles and responsibilities as well as leadership cultivation and succession.
- **Community Outreach and Support:** Assure broad public support for the land trust and its work and increase involvement of the community in the programs and operations of the land trust. (Note: Challenge Fund awards will not support lobbying.)
Example Project: Develop a community outreach plan including specific goals, expectations and an implementation strategy that addresses media outreach, newsletters, and events to increase visibility of and support for the land trust.
- **Land Trust Collaborations:** Increase the pace of land conservation and the support for the work of land trusts through a collaborative planning and implementation process.
Example Project: Establish a vision and mission for a collaboration, building the foundation for a specific shared effort that enhances land conservation in a region. The process will identify the roles and responsibilities of each land trust as it relates to the collaborative and the decision making processes the collaborative would employ.
- **Organizational Assessment:** Complete a thorough analysis of the organizational progress toward implementation of *Land Trust Standards and Practices*.
Example Project: Complete a full organizational assessment measured against *Land Trust Standards & Practices*, establishing a detailed roadmap and strategy for achieving their implementation over a 2-year period.

Obtaining Consultant Services

Recipients of a Challenge Fund Award will be responsible for choosing the consultant with whom they will work to complete their project. Awardees will be responsible for providing the Challenge Fund with information about the qualifications of their choice of a particular consultant. Guidance on potential consultants and the process for choosing them is available from the Alliance and CLCC. For consultant

contracts using \$15,000 or more from the Challenge Fund, consultant selection requires proof the land trust(s) received and reviewed bids from at least three consultants.

The contract with the chosen consultant will be a three-way agreement between the consultant the Alliance and the land trust. A contract template will be provided by the Alliance.

Reporting Requirements

The term of the Challenge Fund services is up to twelve (12) months, beginning on the date the consultant contract for program support services is executed. Land trusts receiving Challenge Fund services are expected to submit a final report 30 days after completion of the project, and in any event no later than 13 months after Challenge Fund service contracts are executed. Report forms will be provided by the Alliance. If a land trust fails to comply with the terms of the consultant support agreement or to file a final project report, it may be deemed ineligible for future Alliance or CLCC support and may be required to repay the entire cost of the consultant services to the Alliance.

APPLICATION INSTRUCTIONS

Review Committee

The Land Trust Challenge Fund Review Committee (Review Committee) will review and evaluate the applicant's response to the required questions of the proposal narrative, supporting materials and overall fit with the Challenge Fund **Evaluation Criteria** (below). Based on this competitive review, the Land Trust Alliance, with advisory support from the Review Committee, will make final decisions on awards.

Evaluation Criteria

The Review Committee will assess your proposal based on the following criteria:

- Project Description: Project fits within one or more of the categories of eligible projects with goals that are clearly articulated and outcomes that are well-defined, achievable and measurable.
- Land Trust Standards and Practices: Proposal refers to and aids in implementation of specific *Land Trust Standards & Practices*.
- Organizational Capacity: Project will develop systems or practices that are likely to be sustained beyond the grant period. The project will strengthen board or staff skills and/or strengthen key functions of the organization in the next 12-15 months.
- Land Conservation: Likelihood that the capacity building effort will advance the protection and long-term stewardship of open space.
- Budget and Match Requirements: Project match funds will be secured by project start date and are clearly documented. Project budget is clearly understandable.
- Need and Likelihood of Success: Project can be reasonably accomplished within the stated schedule. Project has a high likelihood of success but is dependent on Challenge Fund investment.

Proposal Cover Sheet

Please submit a proposal cover sheet (page seven) with the proposal narrative and other required attachments.

Proposal Narrative

Interested applicants are to submit the proposal narrative (not to exceed four [4] pages) attached to the proposal cover sheet. To receive full consideration, the proposal narrative should specifically address each of the following items:

(1) Land Trust Description – Brief summary of land trust mission, goals and accomplishments.

(2) Project Description

What is the specific project the land trust proposes to undertake with consultant support services? What are the goal(s), expected measurable outcomes and timeline of the project? (Please be specific) What board and/or staff will be leading the project and what other board/staff will be involved?

How will the proposed project help the land trust(s) implement *Land Trust Standards and Practices*? Please note which practices will be directly addressed by the project.

Please note under which Eligible Project category(ies) this project fits (page three).

(3) Land Trust Capacity

How will the support services improve overall capacity and ability of the land trust to achieve its mission and increase the pace and effectiveness of land conservation in Connecticut?

(4) Eligibility

Please confirm the organization(s) satisfies the eligibility requirements (page two).

(5) Budget and Match

What is the budget and what are the expected sources of the in-kind and cash match? Please provide a Project Budget that includes specific cost for consultant. Write or type directly into budget template (page eight). For electronic template, please visit www.landtrustalliance.org/CT_ChallengeFund.

Matching Requirements

Challenge Fund applicants must provide a match of at least 25% of the value of consultant services requested. At least half of the match must be in cash, while up to half of the match may be in the form of in-kind support.

Cash match may include land trust funds and/or staff time specifically devoted to the project. In-kind support may include donated goods and/or services, including volunteer services committed directly to the project. Based on IRS guidelines, the current value of volunteer services in Connecticut is \$25.75/hour. All matching funds and in-kind support must be well-documented.

Example of Land Trust Match: XYZ Land Trust is interested in retaining a consultant to develop a strategic land conservation plan for its service area. The Land Trust determines the consultant cost to complete the project will be \$4,000, which is requested from the Challenge Fund. The land trust will be responsible for a match of 25% of the consultant cost, or \$1,000. At least half of this match, or \$500,

must be cash, the remainder can be in-kind. The land trust identifies the other costs for the project to be GIS mapping services, document research and printing. The GIS mapping services cost \$500 which the land trust pays in cash. A volunteer board member provides 10 hours of time compiling existing land trust documents for the plan, which is valued at \$257.50. Finally the land trust gets the printing of the final maps and plan documents donated by the local print shop. The value of the printing is \$250.00. The total match equals \$1,007.50.

Example Project Budget

CT Land Trust Challenge Fund Request For Proposal Budget				
Land Trust:		Date:		
Expense Category	Capacity Building Support Program Services	Matching Funds	In-Kind Support	Total Project Expenses
Consultant	\$4,000.00	\$0.00	\$0.00	\$4,000.00
GIS Mapping Services	\$0.00	\$500.00	\$0.00	\$500.00
Printing (Donated)	\$0.00	\$0.00	\$250.00	\$250.00
Board Volunteer (10 hours @ \$25.75/hour)	\$0.00	\$0.00	\$257.50	\$257.50
Total	\$4,000.00	\$500.00	\$507.50	\$5,007.50
IMPORTANT: Please indicate number of staff and/or volunteer hours to be used as match. Documentation of listed project expenses, including for in-kind support, will be required in final report.				
Notes:				

Supporting Materials

In addition to the proposal narrative, please enclose the following supporting documentation, if available.

1. One (1) copy of the land trust's current strategic plan.
2. The land trust's most recent annual report, financial statement and budget.
3. Map of land trust(s) service area.
4. Additional relevant materials about the organization (e.g. brochures, newsletters).
5. List of current board members and staff (if applicable).

Proposal Deadline and Submittal Instructions

Please submit six (6) copies of the proposal cover sheet and narrative along with one (1) copy of supporting materials. All proposals and supporting materials must be delivered (not postmarked) by **June 8, 2009** to: Land Trust Alliance, P.O. Box 1797, 7 West St., Suite 33, Litchfield, CT 06759. Facsimiles and e-mail proposals will not be accepted.

Questions?

Please contact Katelyn Homeyer, Land Trust Alliance, Northeast Program Assistant, for additional information about the Land Trust Challenge Fund. E-mail: khomeyer@lta.org, Ph: (518) 587 0774.

**2009 Connecticut Land Trust Challenge Fund
PROPOSAL COVER SHEET**

1. Background Information

Project Title: _____

One-sentence Project Description: _____

Name of Organization: _____

Address: _____

Telephone: _____ Fax: _____ E-mail: _____

Lead Person Overseeing Project: _____ Title: _____

Town(s) in Land Trust Service Area: _____

Project Area: _____

In what year was your land trust founded? _____

How many board/staff do you have? _____ Board _____ Full-time Staff _____ Part-time Staff

How many members/donors/contributors do you have? _____

2. Eligibility

Is your organization currently a Land Trust Alliance Member Land Trust? YES NO

If not, please contact Barton Zervas, Membership Coordinator, at 202-638-4725 x331 or email at bzervas@lta.org to become a Member Land Trust or go to <http://www.landtrustalliance.org/get-involved/membership>. Applicants must be Land Trust Alliance members.

Is your organization a Connecticut Land Conservation Council member? YES NO

If not, please contact Sarah Pellegrino at CLCC at 860-344-0716 x320 or email at spellegrino@tnc.org to become a Member Land Trust. Applicants must be Connecticut Land Conservation Council members.

3. Connecticut Conservation Profile

Approximately how many acres has your land trust protected in Connecticut to date?

Acres owned in fee: _____ Acres under conservation easement: _____

Fee parcels: _____ # conservation easements: _____

PROPOSAL CHECKLIST

Proposal:

- Proposal Cover Sheet
- Proposal Narrative (not to exceed 4 pages)
- Project Budget (Use template on reverse side)

Supporting Materials (if available):

- Current strategic plan, if available.
- Most recent annual report, financial statement and budget
- Map of land trust(s) service area.
- Printed relevant materials about the organization (e.g. annual report, brochures)
- List of current board members and staff (if applicable).

Proposal Submitted By: _____ Title: _____ Date: _____

CT Land Trust Challenge Fund Request For Proposal Budget

Land Trust:

Date:

Expense Category	Capacity Building Support Program Services	Matching Funds	In-Kind Support	Total Project Expenses
Total				

IMPORTANT: Please indicate number of hours for staff and/or volunteer to be used as match.
Documentation of listed project expenses, including for in-kind support, will be required in final report.

Notes: