



**OPEN SPACE
INSTITUTE**

Greater Philadelphia Land Protection Program Outer Counties Capital Grant Package - Fall 2026

The Greater Philadelphia Land Protection Program (GPLPP) supports permanent land protection and planning with the goals of increasing equitable access to open space, preserving critical ecological values, and enhancing community resilience to climate impacts. The Greater Philadelphia Land Protection Program is made possible with generous support from the William Penn Foundation.

This Outer Counties Capital Grant package includes the following:

- [Grant Summary](#)
- [Scoring Guidance](#)
- [Stewardship and Easement Guidance](#)
- [Capital Grant Checklist](#) for projects awarded funding
- [Application Form](#)
- [Budget Summary Form](#)
- [Frequently Asked Questions](#)

Grant Summary

Purpose and Priorities

Capital grants are awarded for the permanent protection of land through fee or conservation easement acquisition projects that advance one or more of the Fund's three priorities. Projects that advance multiple Fund priorities will be reviewed favorably; however, successful projects may also demonstrate strong contributions to just one of the Fund priorities:

- 1) **Equitable Access.** Projects that advance this priority will make open space, natural, or recreational resources available or more welcoming to the public. The Fund will prioritize support for projects that enhance access for communities that have experienced historic disinvestment and/or that have been disproportionately impacted by environmental burdens. The Fund will prioritize projects that have clearly identified beneficiaries (ideally who are involved in the development of the project) and include a plan for any infrastructure or special management considerations needed to support access for identified communities.
- 2) **Ecology.** Projects that address this priority will advance one or more of the following:

- Supporting biodiversity and/or rare or important species habitat;
- Contributing to the protection of the more than 1.4 million acres of remaining unfragmented forest blocks over 100 acres within the region;
- Securing portions of identified wildlife movement corridors that support climate adaptation; or
- Maintaining watershed health through protection of headwaters, stream corridors, wetlands, or other intact water resources.

The Fund will prioritize projects that are either currently in an intact, natural condition that supports the above outcomes, or that demonstrate plans for restoration that will be needed to achieve ecological outcomes.

Climate Resilience. The Fund will prioritize projects that are consistent with an existing climate resilience or other community-led plan identifying strategies to mitigate climate impacts to people. Projects that advance this priority will achieve one or more of the following:

- Protecting land with the potential to strengthen resilience to climate impacts for people (e.g. protecting flood storage, reducing storm runoff, reducing heat islands, supporting aquifer recharge); or
- Supporting coastal resilience and freshwater aquifer protection through conservation of marsh migration space and/or other areas vulnerable to sea level rise.

Use of Funds

All projects must:

- Achieve permanent protection through fee purchase of land or a conservation easement.
- Be at least partly located in one of the eight eligible Outer Counties (see Fund Geography).
- Meet the Fund’s stewardship standards (see Stewardship Guidance).
- Advance one or more of the Fund’s priorities of increasing access to open space, preserving critical ecological values, and enhancing climate resilience.
- Be part of an existing plan or vision that advances the goals of the grant program *or* demonstrate potential to achieve “transformational” outcomes (see Criteria).

Capital Grants can fund:

- The purchase of land or easements (as substantiated by an appraisal).
- Transaction and due diligence costs, including the cost of appraisals, title investigation and insurance, surveys, or environmental assessments. *If such transaction expenses are defrayed by another source before or after closing, the capital grant will be reduced accordingly.*

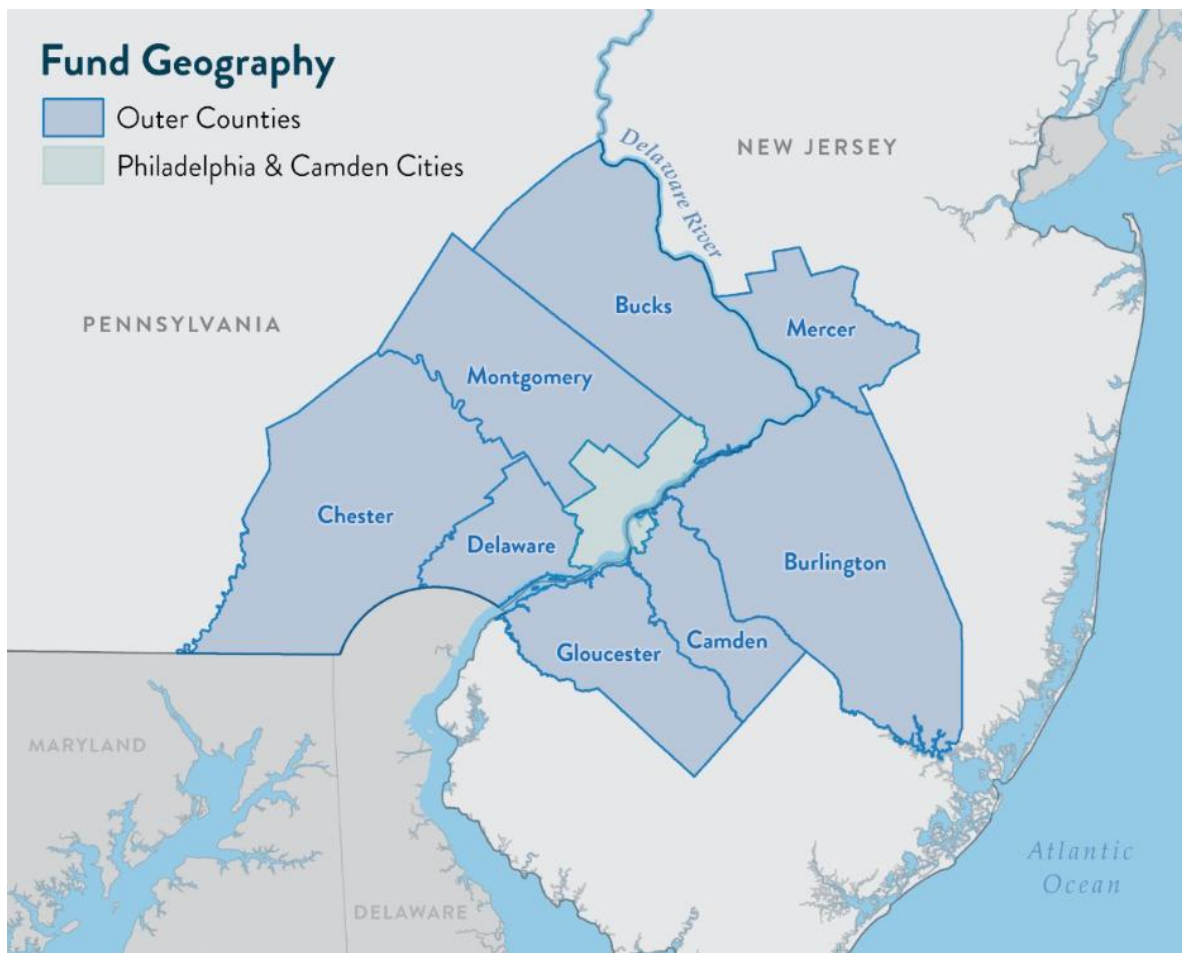
Capital Grants cannot fund:

- Staff costs

- Project stewardship, stewardship endowments, and restoration costs
- Fundraising costs
- Political lobbying

Fund Geography

Qualified organizations may apply for Capital grants within the eight-county region surrounding the Cities of Philadelphia and Camden, as illustrated in the map, below. This includes Bucks, Montgomery, Delaware, and Chester counties in Pennsylvania and Mercer, Burlington, Camden, and Gloucester Counties in New Jersey. Applicants are encouraged to use the [Eligibility Map](#) within the [Greater Philadelphia Mapping Resource Center](#).



Timing Considerations

Applications are due by Friday, September 25, 2026. Applications must be submitted through OSI's grant management platform, Foundant. An application form is included in this package for reference and planning purposes. Applicants will be notified about grant decisions in December of 2026. Projects should be designed to be completed within 18 months of grant notification.

Eligible Entities

Capital grant proposals will be accepted from land trusts and other non-profit organizations committed to advancing permanent land conservation in the Greater Philadelphia Outer Counties. Land trusts should adhere to Land Trust Alliance Standards and Practices and either be accredited, or on the path to accreditation. Grant proceeds may be delivered directly to government entities to close the relevant project if a nonprofit is the grant applicant and partner in the transaction.

Fund Availability

In this Fall 2026 round, up to \$1,230,000 is available for Capital Grants in the Outer Counties.

Grant Award Size

There is not a minimum or maximum grant award size, but the general range of awards is expected to be between \$200,000 and \$400,000. Larger grants may be awarded to projects that deliver extraordinarily on Fund priorities.

Match Requirements

OSI gives preference to projects with a 4:1 or greater match (meaning OSI is contributing up to 20% of the total project funding). OSI will consider projects that bring a lower match if 1) the applicant demonstrates other funding is not available, and 2) the project has outstanding attributes. Please reach out to Bill Rawlyk, OSI's Senior Program Manager Mid-Atlantic, prior to applying if you feel your project falls into this category.

The following qualify as matching funds:

- Public funds (federal, state, and local) and private funds (individuals, foundations, corporations).
- The value, full or partial, of a donated conservation easement or bargain sale (as substantiated by an appraisal).
- The value of eligible match properties (see below, and as substantiated by an appraisal).
- Out of pocket transaction and diligence costs, including appraisals, surveys, environmental assessments, title exams and insurance, forest management/stewardship plans, recording fees, transfer and real estate taxes, and property carrying costs. Fees for outside counsel (up to 2% of Fair Market Value of the interest being acquired) are also eligible as match.

The following do not qualify as matching funds:

- Land restoration and management
- Stewardship endowments
- Staff time, travel, or office expenses
- Building construction and maintenance

- Fundraising costs

Match Property Eligibility

Property proposed as Match must 1) be adjacent or proximate to the subject property, 2) meet the Fund's criteria and legal document review, 3) be part of a larger plan that includes conservation of the match and subject properties, and 4) close prior to the closing of the subject property but not more than two years before the date of application.

Project Quality Criteria and Evaluation

OSI will prioritize projects that deliver benefits at a broad scale, such as a town, county, or watershed. Across all three Fund priorities, there is a preference for 1) projects with minimal conversion of land to impervious surfaces, and 2) projects that include clear plans for restoring polluted, developed, or degraded land to natural cover.

OSI has compiled a robust set of data resources for applicants to consider in the [*Greater Philadelphia Mapping Resource Center*](#). Applicants are encouraged to explore the [*Interactive Map*](#) tab, where shapefiles and other data can be uploaded to view alongside other spatial resources organized according to the Fund's priorities. These data are not exhaustive; applicants are encouraged to utilize other datasets that may be relevant or meaningful to the proposal and the Fund's priorities.

All proposals will be evaluated on the following criteria:

- Contribution to Conservation Values
 - Note: Successful proposals will meaningfully contribute to at least one of the Fund's three priorities (access, ecology, and climate resilience)
- Part of an Existing Plan
- Transformational Potential
- Community Benefit
- Meaningful Community Involvement
- Stewardship
- Timeliness and Risk
- Transactional Feasibility

Please review the enclosed [*Evaluation Rubric*](#) for greater detail.

Stewardship Expectations

Please review the [*Stewardship and Conservation Easement Guidance*](#) prior to submitting an application.

Diligence Expectations for Funded Projects

Non-profit applicants selected for funding will subsequently be required to submit organizational documents, including articles of incorporation, bylaws, certificate of good standing, IRS tax-exempt status determination letter, proof of adoption of Land Trust

Alliance Standards and Practices, and a Board resolution approving the proposed acquisition and acceptance of the grant.

All projects selected for funding will be required to submit diligence and transaction documentation prior to the release of grant funding. This includes an appraisal summary demonstrating subject and match property fair market value (dated within one year of closing), a title commitment, executed purchase contract, a boundary survey, and the draft deed or conservation easement. A draft stewardship plan and baseline documentation report must be provided for conservation easement projects. An environmental site assessment must be submitted for fee acquisition projects. All documentation must be reviewed and approved by OSI's legal department prior to the release of funds.

Applicants selected for funding will receive a diligence closing checklist (also included in this package for reference) to review and discuss with OSI staff. If you have any questions or anticipate any issues with the expectations described above, please reach out to OSI staff to discuss.

Grant Review and Administration

Applications are reviewed by OSI staff and an Advisory Committee composed of individuals with strong regional knowledge and a range of relevant expertise and connections, including conservation, land use, equitable access, climate resilience, and conservation finance.

Once a Capital grant is conditionally approved, OSI provides the grantee with a [checklist](#) of required items to initiate the grant agreement (included in this package for reference). Funds are released upon the closing of the transaction.

Staff Contacts

Applicants are encouraged to contact OSI staff with any questions about this opportunity.

Bill Rawlyk, Senior Program Manager Mid-Atlantic (brawlyk@osiny.org)
(908) 642-4747

Scoring Guidance

Projects that score consistently in the top two tiers will be viewed most favorably.

Greater Philadelphia Land Protection Program Outer Counties Capital Grant Evaluation Rubric			
Contribution to Conservation Values Definition: The degree to which projects advance one or more of the Fund's priorities (equitable access, ecology, and climate resilience).			
Absent	Minimal	Moderate	High
Proposed work is unlikely to contribute to the Fund's priorities.	Proposed work would make a marginal and/or uncertain contribution to advancing the Fund's priorities.	Proposed work would make a clear contribution to advancing one or more of the Fund's priorities.	Proposed work would make a clear and major contribution to advancing one or more of the Fund's priorities.
<i>Additional Note: Please review the Grant Package for more detailed descriptions of the Access, Ecology, and Climate Resilience priorities</i>			
Part of an Existing Plan Definition: OSI seeks to fund Capital projects that are part of strong existing plans that advance one or more of the Fund's priorities of equitable access, ecology, and climate resilience. OSI will not fund small, isolated projects that do not advance a broader, collaborative vision or plan unless they are transformational in their own right (as defined in the next section).			
Absent	Emergent	Developing	Strong
No evidence that the project aligns with an existing plan or vision.	Project aligns with an existing plan or vision, but doesn't meaningfully advance it . There is minimal evidence of commitment to realizing the plan and/or the plan is outdated .	Project advances an existing plan or vision aligned with the Fund goals, that the applicant and/or partners are actively working to implement. The project's contribution to advancing the plan is modest and the project may not be called out as a priority.	Project will significantly advance an existing plan or vision aligned with the Fund goals. The applicant and/or other partners are committed to and are actively working to realize the plan. The plan identifies the project as a priority .
<i>Additional Notes: Plans may take a variety of forms and may be at a variety of scales (e.g. organization, local, regional, state, national) but should align with one or more of the Fund goals. If plan is at a broader scale, applicants should demonstrate that they have downscaled the plan to local priorities. Applicants should demonstrate that they are actively committed to implementing the plan.</i>			

Transformational Potential

Definition: Projects that do not advance an existing plan or vision must demonstrate their potential to achieve “transformational” outcomes aligned with Fund priorities. Examples include: 1) Creating access to previously inaccessible natural or recreational resources, such as a waterway or a trail corridor; 2) Advancing a project that addresses a critical need identified through robust and meaningful community engagement; 3) Protecting or connecting critical ecological resources at a large and effective scale; 4) Unlocking new funding sources; 5) Catalyzing the conditions for durable community-led conservation outcomes.

Absent	Emergent	Developing	Strong
The project is unlikely to be transformational.	Transformational outcomes from the project are possible , but may be more speculative.	Transformational outcomes are likely to occur from the project.	Applicant demonstrates strong likelihood for significant and specific transformational outcomes from the project and provides compelling evidence to back this up.

Additional Notes: Projects that are not part of an existing plan or vision should clearly demonstrate “Transformational Potential.” Projects that are part of an existing plan need not score highly on Transformational Potential.

Community Benefit

Definition: OSI will prioritize projects resulting in benefits to specific beneficiaries.

Absent	Emergent	Developing	Strong
Proposal does not identify community benefits that are likely to result from the project.	Proposed benefits resulting from the project are general in nature, speculative, and/or the beneficiaries are not well-defined.	Project likely to result in benefits to specific beneficiaries , however some of these proposed benefits may be more speculative.	Project will result in significant benefits to specific beneficiaries. There is a strong plan in place to ensure that these benefits will be realized.

Additional Notes: Projects can move up one level in scoring if the project will result in meaningful benefits to communities that have experienced historic disinvestment or that are disproportionately impacted by climate or environmental burdens.

Meaningful Community Involvement Definition: OSI will prioritize projects where community has been or will be involved in project planning and/or implementation, which may be evidenced by documented community support for the project.			
Absent	Emergent	Developing	Strong
No meaningful involvement of community in project planning or implementation	Limited involvement of community in project planning or implementation. Community support may be unclear .	Meaningful involvement of community in project planning or implementation indicates community support for the project.	Robust and sustained involvement of community in project planning and implementation indicates project alignment with community-identified priorities or needs.
Stewardship Definition: Successful projects will have strong plans for long-term stewardship and an identified entity with the experience, resources, and capacity to manage the property.			
Absent	Emergent	Developing	Strong
Project does not have an identified long-term steward and/or proposed management is inconsistent with Fund goals	Project has an identified steward with potential to manage the property over the long-term. The management goals are likely to align with the Fund goals but may not be resolved before the project closes.	Project has an identified steward with some experience or demonstrated potential to manage the property over the long-term. The future owner or steward has articulated goals for the management of the property consistent with the Fund goals . The project structure (i.e. conservation easement or fee structure) ensures permanent protection of property.	Project has an identified steward with the demonstrated experience, resources, and capacity to manage the property over the long-term. The owner or steward has a sound plan for the property's management and protection of conservation values consistent with the Fund goals. The project structure (i.e. conservation easement or fee purchase) ensures permanent protection of property.
<i>Additional Notes: Evaluators may consider information such as the proposed management regime, the steward's management goals, the content of the conservation easement (if applicable), and whether the steward or easement holder has sufficient funding, capacity, and experience to manage land long-term.</i>			

Timeliness and Risk Definition: OSI will prioritize properties at risk of conversion if not protected, and will consider the degree of urgency associated with the transaction.			
Low/Absent	Minimal	Moderate	High
Property is not at risk now or for the foreseeable future.	Property is not at high risk but there is a timely opportunity to protect the land.	Property is at risk of conversion due to market conditions and/or land management and there is a timely opportunity to protect the land.	Property is at high risk of conversion due to market conditions and/or land management.
<i>Additional Notes: Evaluators may consider information such as the current landowner's plans if the land is not conserved, and the type and extent of conversion pressure on project and surrounding area based on 1) current zoning, 2) local development pressure, and 3) suitability of land for other uses.</i>			
Transaction Feasibility Definition: OSI will evaluate transactional feasibility based on the status of due diligence and fundraising and organizational capacity needed to complete the project. Projects should have a realistic timeline and should be on track to close within 18 months of the grant award.			
Absent	Emergent	Developing	Strong
Negotiations, due diligence, and fundraising have not begun and/or are not well-planned.	Negotiations are underway and applicant has a plan for due diligence and fundraising	Negotiations are complete and applicant has a solid plan for due diligence and fundraising.	Property is under agreement , fundraising and due diligence are well-along , and the applicant has a strong track record of completing projects of similar scale and type.
<i>Additional Notes: Evaluators may consider information such as the applicant's financial health and accreditation status (for land trusts), the complexity of the deal, and potential for delays due to factors such as the need for subdivision, mortgage subordination, clearing title issues, or fundraising.</i>			

Stewardship and Conservation Easement Guidance

All Capital projects funded through the Open Space Institute's (OSI) Greater Philadelphia Land Protection Program (GPLPP) must be managed to sustain and enhance the land's ability to support the purposes of the Fund – to enhance public access to open space, to support intact function of ecological systems, and/or to strengthen climate resilience for human communities.

Project applications may choose to address one primary benefit listed above, or a combination of these benefits. Applicants must demonstrate that the future, long-term stewardship provisions for the project will adequately support the specific purposes identified in the application.

Prior to submitting a grant proposal, applicants should review OSI's standards for fee land stewardship and Conservation Easement (CE) terms outlined below. Grant proposals should describe how land stewardship and/or CE terms will meet these standards and the goals of the Fund.

OSI staff will work with Grantees to ensure that CE language and/or stewardship plans are consistent with the Fund's goals. We understand that every CE is different, and there are multiple ways to craft CEs to meet the same goals. OSI does not, therefore, require particular language. OSI staff can work with applicants to identify CE language to address Fund goals on a case-by-case basis. OSI staff must approve the final CE prior to distribution of grant funds. If a land stewardship plan is available before closing, OSI will review and comment on the plan. If not, grantees will be asked to describe long-term stewardship intentions.

Land Stewardship for Fee Projects

The conservation entity that will own and manage the land should have as a primary goal the protection of land for public access, ecological intactness, climate function and resilience, or other closely related conservation values. In addition, the permanent land steward should have demonstrated funding, capacity, and expertise to manage the land for these values. Where the land will be permanently transferred to another entity, the applicant must demonstrate that entity's degree of alignment with the Fund's management goals and likelihood that management will maintain and support these goals long-term.

Regardless of what purpose the project seeks to meet, land stewardship should attempt to support the property's natural land cover and ecological processes. Where access is an intended purpose, the applicant will need to demonstrate that they can provide a safe, welcoming environment for the intended users of the property. Where relevant to the project purposes, land management activities should:

- Provide safe and welcoming public access and where applicable, creation of trails and related facilities to afford public access.

- Support restoration of the land, if needed, to expand the extent of native forest cover, and improve ecological function, climate resilience and water quality.
- Protect and/or enhance the property's surface and groundwater resources;
- Minimize road building, road paving and stream crossings except as required for access.
- Prohibit mining and oil/gas extraction.
- Minimize or prohibit intensive recreational uses (ATV's and RV camping, for example).
- Retain mature, native forests and native understory and prohibit clearing or conversion of native forests to other uses.

Note that forest management may be allowed in some instances but must be secondary to the conservation purposes above. Forest management should be permitted only after obtaining a forest management plan by a certified forester. Plans should be "climate-informed," focused on maintaining or increasing existing forest cover, stored forest carbon, and protecting native species and ecological integrity.

In addition to the above, Conservation Easement projects must:

- Be held by a conservation organization or agency with a demonstrated track record in CE monitoring and enforcement, and sufficient funds and staff to monitor and defend the CE.
- The CE Purposes should place priority on protecting the property's native forest and vegetative cover, stored forest carbon, soils, surface and ground water quality and ecological processes.
- Include effective and practical monitoring and enforcement provisions.
- Ensure a process for regular, productive communication between the easement holder and landowner.
- Require a baseline documentation report.

Capital Grant Due Diligence Checklist for Awarded Projects

The following is provided for reference and planning purposes. All projects awarded funding will need to adhere to this checklist as a condition of receiving funds.

OSI is responsible for providing a preliminary grant approval letter and term sheet and conducting a site visit and file review prior to drafting the grant agreement and escrow instructions. OSI staff will initiate a call to review this checklist at the onset of the grant award to review grantee's responsibility and ability to provide the following:

ORGANIZATIONAL DOCUMENTS

- Articles of incorporation and all amendments
- Bylaws and all amendments
- Certificate of good standing / certificate of existence / subsistence certificate (issued within one year of project closing date)
- IRS tax-exempt status determination letter
- Proof of Land Trust Alliance (LTA) accreditation, pursuit of accreditation (if applicable), or Board Resolution to follow as best as practicable LTA Standards and Practices
- Grantee board resolution(s) approving both acquisition and acceptance of the grant

DUE DILIGENCE

- Contact information for Grantee's attorney
- Executed preliminary grant approval letter and attached term sheet
- Executed purchase / option agreement, any amendments, and proof of option exercise
- Appraisal summary demonstrating property value at or above the purchase price (issued within one year of project closing date)
- Title commitment (note: commitment *not report*) for Grantee insuring the property is free of all liens, leases (unless approved by OSI), mineral rights, and other significant third-party interests; the title commitment should include copies of any recorded instrument creating an exception to coverage. It is requested that title information be submitted for review as early as possible in the process.
- Boundary survey certified to Grantee and matching legal description
- Phase I environmental site assessment for fee acquisition or preliminary environmental investigation for conservation easement
- Baseline data report (conservation easements only)
- Summary of management objectives for the subject property, or management plan to be followed by the property owner.
- Final documents evidencing subdivision (if applicable)
- Draft deed and / or conservation easement in conformance with Fund guidelines
- Escrow information, including company name, individual contact, agent's address,

- telephone, email address, and wiring instructions
- Executed match document (template to be provided)
- Executed W-9 (issued within one year of project closing date)

CLOSING

- Executed escrow instructions
- Executed deed / conservation easement
- Executed settlement statement
- Marked-up title commitment / title policy

Application Form

The following is provided for reference only. All applications must be filled out and submitted through OSI's grant management platform, Foundant. Prompts marked with a red asterisk (*) require a response.

Organizational Information

Type of Organization*

Choices

Land Trust
Other Non-Profit

Organization's Founding Date and Mission Statement*

Please tell us when your organization was founded and how land protection contributes to its mission statement.

Suggested Character Limit: 750

Tax Exemption*

Is your entity tax-exempt?

Choices

Yes
No

Land Trust Alliance Standards & Practices - for Land Trusts Only

Adoption of these standards is an eligibility requirement for land trusts.

Please describe whether your organization has adopted LTA standards and practices.

Suggested Character Limit: 200

Land Experience—for non-land trust applicants only:

Please describe how your organization/entity is prepared to handle a land transaction and, if applicable, experience with land ownership and stewardship.

Suggested Character Limit: 500

Project Overview

Project Name*

Project name must be short and reflect the project's natural features, such as "Blue Mountain."

Please do not use the current deed holder names.

Suggested Character Limit: 100

Project Summary*

Provide a concise overview of the project that addresses the following:

1. Acquisition partners and roles.
2. Proposed transaction structure and timing.

Suggested Character Limit: 1,500 (approx. 1/2 page single-spaced)

Project Location - Town*

Provide names of town(s) your project is located within.

Suggested Character Limit: 150

Project Location – State*

Please choose all states that apply.

Choices

New Jersey

Pennsylvania

Project Location – County*

Please choose all counties that apply.

Choices

Bucks County, PA

Chester County, PA

Delaware County, PA

Montgomery County, PA

Burlington County, NJ

Camden County, NJ

Gloucester County, NJ

Mercer County, NJ

Total Project Acreage*

Any acreage anticipated to be excluded from protection (through subdivision, the use of envelopes or exclusions, or any other means) should not be included in the acreage subtotals in this section. Note: Excluded areas should be clearly shown on any maps uploaded with this application and provided as separate shapefile(s).

Enter the total acreage of all Subject and Match Properties combined. If there are no Match Properties, this number is the same as Subject Property Acreage.

Suggested Character Limit: 20

Subject Property: Total Acreage*

Subject Property includes properties for which you are requesting an OSI grant.

Suggested Character Limit: 20

Subject Property: Acreage to be Acquired in Fee*

If there are no acres in fee, enter zero.

Suggested Character Limit: 20

Subject Property: Acreage to be Placed Under Conservation Easement*

If there are no acres in conservation easement, enter zero.

Suggested Character Limit: 20

Match Property: Total Acreage*

If there are no Match Properties, enter zero.

Suggested Character Limit: 20

Match Property: Acreage to be Acquired in Fee*

If there are no acres in fee or no Match Properties, enter zero.

Suggested Character Limit: 20

Match Property: Acreage to be Placed Under Conservation Easement*

If there are no acres in conservation easement or no Match Properties, enter zero.

Suggested Character Limit: 20

Property Condition*

Please provide a concise overview of the condition of the Subject Property that addresses the following:

1. Topography and landforms (e.g. ridges, outcrops, cliffs, caves, and water features such as rivers, lakes, streams, and vernal pools).
2. Dominant vegetation types and description of their health and any known stressors, including the presence and impact of invasive plants or insects.
3. Documented occurrences of listed threatened or endangered species.
4. Past and current land management activities and uses and other relevant human impacts, including the presence and intended future use of any structures.

Suggested Character Limit: 3,500 characters (approx. 1 page single-spaced)

Landscape Context*

Please provide concise context for protection of the Subject Property that addresses the following:

1. Detail any nearby protected lands and describe the project's contribution to the protected landscape.
2. Describe the landscape context surrounding the project, including any significant human impacts such as pollution sources or degraded land uses.

Suggested Character Limit: 1,500 (approx. ½ page single-spaced)

Project Impact

Advancement of an Existing Plan or Vision*

Please provide a concise response that address the following:

1. Does the project advance an active plan or vision identifying priorities related to ecology, equitable access, or climate resilience? If so, please indicate which plan(s), the partners involved in developing or implementing the plan(s), and how the project advances the plan(s).
2. Describe the status of plan implementation, including your organization's commitment to achieving the goals of this plan and any prior work to achieve meaningful outcomes within your service area.

Suggested Character Limit: 1,500 (approx. ½ page single-spaced)

Transformational Potential

Please indicate how, if at all, your project could be considered "transformational," including but not limited to how the project may:

1. Create access to previously inaccessible natural or recreational resources;
2. Advance a project that addresses a critical need identified through robust and meaningful

- community engagement;
- 3. Protect and connect critical ecological resources at a large and effective scale;
- 4. Unlock new funding sources; or
- 5. Catalyze the conditions for durable community-led conservation outcomes

Suggested Character Limit: 1,500 (approx. ½ page single-spaced)

Community Involvement

If applicable, please describe:

- 1. How you define community in the context of this project.
- 2. Whether and how the community has been (or is intended to be) involved in the project, including a description of the specific community-level collaborators involved (e.g. individuals, groups, or organizations).
- 3. The level of decision-making and input community-level collaborators have had in developing the conservation project or envisioning its long-term use.

Suggested Character Limit: 1,500 (approx. ½ page single-spaced)

Community Benefit

If applicable, please describe as specifically as possible:

- 1. Who will benefit from your project.
- 2. What community need(s) will be addressed and how they were identified.
- 3. Any long-term strategy to ensure that intended community benefits are realized and experienced by intended beneficiaries.

Suggested Character Limit: 1,500 (approx. ½ page single-spaced)

Equitable Access

If relevant, describe whether and how the project will make open space, or natural or recreational resources available to people, including:

- 1. How the project will create or expand access to nature.
- 2. Specific resources or assets the project will make available to the community.
- 3. How intended communities will access the property.
- 4. Estimated number of visitors or users, and/or any indication of community demand.
- 5. Demographics of communities that will gain access, and if any of these communities have experienced historic disinvestment and/or are disproportionately impacted by climate or environmental burdens.
- 6. Any project elements designed to reduce barriers to access or ensure the site is welcoming, safe, and secure for the local community.

Suggested Character Limit: 3,500 (approx. 1 page single-spaced)

Ecology

If relevant, describe the primary ecological resources this project protects. Please indicate how, if at all, the project contributes to the protection of the following:

- 1. Biodiversity, rare and important species habitat.
- 2. Remaining unfragmented forest blocks over 100 acres within the region.
- 3. Identified wildlife movement corridors that support species adaptation.
- 4. Watershed health through protection of headwaters, stream corridors, wetlands, or other intact water resources.

Suggested Character Limit: 3,500 (approx. 1 page single-spaced)

Climate Resilience

If relevant, describe how the project will serve to buffer the impacts of climate change to human communities. If applicable, please specify:

1. Which climate hazard(s) the project seeks to address.
2. How, if at all, the project will contribute to supporting adaptation or reducing existing or future risks.
3. If relevant, how the project will support marsh migration or coastal resilience.

Suggested Character Limit: 3,500 (approx. 1 page single-spaced)

Stewardship

Stewardship Goals *

Please describe:

1. The long-term stewardship strategy and primary management goals for the Subject Property.
2. If relevant, describe any additional restoration, infrastructure, or special management considerations needed to ensure the project delivers intended benefits, and any funding that is available or planned to support these activities.
3. How long-term management is intended to remain aligned with the Fund Stewardship and Conservation Easement Guidance, particularly if the applicant is not intended to be the long-term fee or easement holder for the Subject Property.

Suggested Character Limit: 1,500 (approx. ½ page single-spaced)

Long-Term Steward*

Please describe:

- 1) Who will be responsible for stewardship and management activities and how their goals and experience are consistent with the goals of the grant.
- 2) Current stewardship capacity of responsible party(ies) and any factors expected to affect that capacity over time.

Suggested Character Limit: 1,500 (approx. ½ page single-spaced)

Conservation Easement

If a conservation easement will be used, please summarize the proposed purposes and anticipated reserved rights and restrictions.

Suggested Character Limit: 1,500 (approx. ½ page single-spaced)

Timeliness and Risk

Development Potential and Threat*

Please describe the factors affecting the development potential of the Subject Property, including zoning or physical limitations of the site, local development pressure based on recent market trends, including the most likely land use/cover changes (if any) if the land were to be sold and not conserved (e.g. conversion to residential development, etc.), and whether the property has been the subject of recent offers or inquiries from prospective buyers.

Suggested Character Limit: 1,500 (approx. ½ page single-spaced)

Mineral Rights*

Please describe whether any mineral rights are fully attached to the property or are severed or subject to a lease. If any mineral rights are known to be outstanding, please provide details about the nature of ownership and date of severed mineral rights, likelihood and method of mineral extraction, any potential for re-attachment, and other risks posed to the project and surrounding properties. If the status of mineral rights is not known, please be advised that any funding will be conditioned, in part, on their status and associated risks.

Suggested Character Limit: 1,500 (approx. ½ page single-spaced)

Urgency*

Please describe any factors affecting this conservation opportunity, such as deed holder circumstances, funding availability, local or regional policy changes, or other time-limited factors.

Suggested Character Limit: 1,500 (approx. ½ page single-spaced)

Transaction Details

Transaction Status and Timing*

Please describe the status of the transaction for the Subject Property:

1. Status of negotiations and level of deed holder commitment to the transaction, including whether a purchase and sale agreement is in place.
2. Status and timing for completion of all due diligence items (e.g., appraisal, survey, title, environmental assessment, mortgage subordination for easement where applicable, etc.) and any relevant factors affecting successful completion.
3. Likelihood of securing all necessary funding commitments.
4. Any other actions required prior to closing, such as subdivision approval, building demolition, hazardous waste remediation, securing permits, or dam safety protection.
5. Likelihood of closing within 18 months if awarded funding. Please describe any known factors that might keep the project from closing in that timeframe.

Suggested Character Limit: 1,500 (approx. ½ page single-spaced)

Match*

If a grant is awarded, Match Property(ies) are subject to the same diligence standards as Subject Property(ies), including appraisal requirements.

Does this submission include Property(ies) to be used as Match?

Choices

Yes

No

Match Justification

Match Property must close prior to the closing of the Subject Property but not more than two years before date of application.

If applicable, please provide a justification for including the parcel(s) as match:

1. Transaction structure (including deed holders, partners and respective roles) and timing.
2. Natural resource values.
3. Alignment with stewardship expectations.

Suggested Character Limit: 3,500 (approx. 1 page single-spaced)

Financial Information

Project Financials *

Download the Budget Summary Form. Once complete, upload below.

File Size Limit: 1 MB

Budget Narrative*

Referring to your Budget Summary Form, address each of the following:

1. Amount and sources of funds secured;
2. Plans for raising outstanding funds; and
3. Proposed use of OSI grant funds.

Suggested Character Limit: 3,500 (approx. 1 page single-spaced)

Total Grant Amount Requested*

Suggested Character Limit: 20

Total Eligible Project Cost*

Note: Please use the same number included in the budget form ("subtotal eligible project costs").

Suggested Character Limit: 20

Total Estimated Value of Subject Property*

Enter estimated Fair Market Value of Subject Property(ies) to be acquired in fee and/or conservation easement.

Suggested Character Limit: 20

Total Estimated Value of Match Property*

Enter estimated Fair Market Value of Match Property(ies) to be acquired in fee and/or conservation easement.

If there are no match properties, enter zero.

Suggested Character Limit: 20

Total Fair Market Value of Properties*

Enter the combined fair market value of all Subject and Match Properties.

Suggested Character Limit: 20

Estimated Funding Sources - Federal*

Enter the total amount of expected and/or secured Federal funding. If none, enter zero. Please use the same number entered in "Estimated Sources of Funds (for eligible costs)" table of Budget Summary Form.

Suggested Character Limit: 20

Estimated Funding Sources - State*

Enter the total amount of expected and/or secured State funding. If none, enter zero. Please use the same number entered in "Estimated Sources of Funds (for eligible costs)" table of Budget Summary Form.

Suggested Character Limit: 20

Estimated Funding Sources – Local/Municipal Government*

Enter the total amount of expected and/or secured Local funding. If none, enter zero. Please use the same number entered in “Estimated Sources of Funds (for eligible costs)” table of Budget Summary Form.

Suggested Character Limit: 20

Estimated Funding Sources - Foundation*

Enter the total amount of expected and/or secured Foundation funding. If none, enter zero. Please use the same number entered in “Estimated Sources of Funds (for eligible costs)” table of Budget Summary Form.

Suggested Character Limit: 20

Estimated Funding Sources – Private (Aggregated Individual Gifts, excluding any bargain sale from deed holder)*

Enter the total amount of expected and/or secured Private funding. If none, enter zero. Please use the same number entered in “Estimated Sources of Funds (for eligible costs)” table of Budget Summary Form.

Suggested Character Limit: 20

Estimated Funding Sources – Deed holder Bargain Sale (Difference between fair market value and purchase price)*

Enter the total amount of expected and/or secured Deed Holder Bargain Sale. If none, enter zero. Please use the same number entered in “Estimated Sources of Funds (for eligible costs)” table of Budget Summary Form.

Suggested Character Limit: 20

Other Estimated Funding

If there is/are additional funding that does not fit into the categories above, please add that total here.

Suggested Character Limit: 20

Supporting Project Materials

Upload the following documents. Total proposal file size is limited; keep file size to the size required for each upload. If more file space is required or if you need assistance with any of the materials listed below, please contact Bill Rawlyk (brawlyk@osiny.org or 908-642-4747).

Project Locator Map*

Upload a map with an aerial photo as a base that shows where the project is located relative to other protected land. Please include relevant community markers, which may include municipal or county boundaries, roads, or other data. Include the Subject Property and Match Property (if applicable) and best available data for protected lands.

File Size Limit: 7 MB

Draft Conservation Easement or Fee Simple Contract (optional, if available)

File Size Limit: 5 MB

Conservation Plan or Vision (optional)

If the project is part of an existing conservation plan or vision, please upload or provide a link to relevant planning document(s).

File Size Limit: 5 MB

Photo 1*

Upload one or two original, full-resolution digital photos of the project. Label photos with project name, noting if it is Subject or Match Property.

File Size Limit: 10 MB

Photo 2

File Size Limit: 10 MB

Shapefiles*

Provide shapefile(s) of the Subject (and Match property, if applicable) in a compressed .zip folder. The .zip folder must contain at least the .shp, .shx, .dbf, and .prj files components of the shapefile. Subject and Match Properties should be submitted as separate compressed .zip folders. Note which parcels are Subject and which are Match. Name the folder with land trust and project name. For example: "(Your Land Trust) Burnt Mountain.zip". If land within the Subject Property is anticipated to be excluded from protection, applicant must provide shapefile(s) for excluded area(s) or submit a shapefile for the Subject Property that does not include that acreage.

File Size Limit: 5 MB

Letters of Support

Letters from project partners and/or intended community beneficiaries are encouraged. General letters of support from others, such as local partners and governmental entities, will also be accepted. If the file size is not sufficient, please email letters to Bill Rawlyk rawlyk@osiny.org.

File Size Limit: 3 MB

Budget Summary Form

The following form is provided for reference only. The Budget Summary Form is downloaded and uploaded for submission on Foundant.

 OPEN SPACE INSTITUTE	Greater Philadelphia Land Protection Program		
	Outer Counties Capital Grant - Fall 2026		
	Project Budget Summary Form		
Applicant:			
Project Name:			
Instructions:			
This template addresses <u>eligible</u> costs and funding sources in Part 1. <u>Ineligible</u> costs and funding sources are covered in Part 2 to enable applicants to reflect the full funding picture. Totals are automatically calculated in Part 3 and should be equal for each category.			
"Project" includes all subject and match properties.			
Add extra rows if needed.			
Part 1: ELIGIBLE COSTS & FUNDING SOURCES			
Eligible Project Costs	If multiple properties are involved, please describe in separate rows and indicate whether it is a subject or match property. Please note that if awarded funding, land and easement values must be substantiated by appraisal.		
Category	Amount	Notes	
Estimated land and/or conservation easement value			
Transaction costs (title work, appraisal, survey, stewardship plan, environmental assessment, etc.)			
Subtotal Eligible Project Costs:	\$0		
Estimated Sources of Funds (for eligible costs)			
Source	In-hand/Pledged	Anticipated	Total
Federal Government Grants			\$0
State Government Grants			\$0
County Government Grants			\$0
Municipal Grants			\$0
Individual Private Donations			\$0
Corporate Sponsorships			\$0
Foundation Grants			\$0
Landowner Bargain Sale			\$0
Other			\$0
<i>OSI grant request</i>			\$0
Subtotal Estimated Funding for Eligible Costs:	\$0	\$0	\$0

Part 2: REMAINDER <u>INELIGIBLE</u> COSTS & FUNDING SOURCES			
<u>Ineligible</u> Project Costs (not eligible for OSI funding or to be considered as match)			
Category	Amount	Notes	
Personnel			
Travel			
Materials & Supplies			
Equipment			
Stewardship Endowment			
Land Management			
Other			
Subtotal Ineligible Project Costs:	\$0		
Estimated Sources of Funds (<u>not eligible</u> to be considered as match)			
Source	In-hand/Pledged	Anticipated	Total
Federal Government Grants			\$0
State Government Grants			\$0
County Government Grants			\$0
Municipal Grants			\$0
Individual Private Donations			\$0
Corporate Sponsorships			\$0
Foundation Grants			\$0
Other			\$0
Subtotal Estimated Funding for <u>Ineligible</u> Costs:	\$0	\$0	\$0

Part 3: TOTALS	
<i>Subtotal Eligible Project Costs:</i>	\$0
<i>Subtotal Estimated Funding for Eligible Costs:</i>	\$0
<i>Subtotal Ineligible Project Costs:</i>	\$0
<i>Subtotal Estimated Funding for Ineligible Costs:</i>	\$0
Total Costs	\$0
Total Estimated Funding Sources	\$0
<i>Totals should match.</i>	

Frequently Asked Questions

What standards does OSI use to judge whether a project is “ready” for a Capital grant?

Projects must be on track to close within 18 months of grant approval. We assess readiness by considering the 1) status of landowner negotiations and purchase contract; 2) status of due diligence, particularly appraisals; 3) percentage of funds secured; and 4) likelihood that outstanding funds can be secured. The Fund gives preference to projects with signed contracts, completed appraisals, and a realistic funding plan. We recommend that projects not be submitted unless you have a signed option or purchase agreement, or one will be obtained no later than six months from date of application.

Can I apply for a Capital grant solely for transaction costs?

Yes. OSI staff will evaluate the merits and readiness of the project in keeping with the guidance provided in this package. If an applicant seeks funding only for transaction costs, all of the funding needed for acquisition should be secured from other sources or very likely to come through. The Fund will prioritize projects with a clear path to closing. All Capital grant funding is expected to be disbursed at closing unless a reimbursement has been specifically approved by OSI in advance.

In other Funds, OSI has offered early project support grants to help advance projects to the written contract and closing stages. Given the constraints and level of funding available for this Outer Counties Capital Grant program, OSI has decided to focus on supporting “ready” projects (as described above).

Can I apply for a Capital project that has already closed?

No. OSI only accepts applications for new land protection efforts. We will consider applications submitted prior to closing within the RFP window, but we will not reimburse partners for conservation projects that have already been acquired.

Will the Fund approve a Capital grant at an early stage in the project?

Sometimes. If the applicant can demonstrate that early funding can catalyze other monies, the Fund may make a contingent capital funding commitment that requires specific outcomes, such as a securing a percentage of necessary funding within a specified time period. Failure to hit such benchmarks will result in withdrawal of the conditional grant approval.

Can an applicant submit a project in phases?

Projects can be phased but only if all phases will close within 18 months of OSI grant approval. Except in extraordinary circumstances, OSI will not release any Capital grant funds until all phases close.

Can a grant be turned into a reimbursement?

In rare instances, OSI will release a grant after the project closes instead of wiring funds to closing. Post-closing payment is contingent on OSI approval prior to closing. To obtain this pre-approval, the grantee must submit all required due diligence documents for OSI review and approval at least two **months** prior to closing.

What is the process and timing for receiving a Capital grant?

Upon OSI approval of a Capital grant, OSI will send a conditional approval letter and a checklist of closing documents that grantees must provide. Once the grantee has provided specified documents, OSI will prepare the grant agreement. OSI then reviews these documents to ensure that the project meets the Fund requirements. Capital funds and remaining transaction costs are released at closing of all parcels – subject and match if applicable.