



# Forest Legacy Program Request for Proposals



Protecting Private Forestlands From Conversion to Non-Forest Uses

# Grant Program for Fiscal Year 2025 Spring Application Cycle

# Inflation Reduction Act (IRA) Funding

# Deadline for Proposal Package Submission: Wednesday, March 20, 2024, by 5:00 p.m.

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# \*\*Important Applicant Information\*\*

Project proposals, applications and maps for the Forest Legacy Program for the FY2025 spring IRA application cycle is due to the Virginia Department of Forestry (DOF) on **Wednesday**, **March 20**, **2024**, by 5:00 p.m. (the "due date").

Application materials for the program can be found as addendums attached to this Request for Proposals (RFP) and are also available by contacting Forest Legacy Program Coordinator Justin Altice at <a href="mailto:justin.altice@dof.virginia.gov">justin.altice@dof.virginia.gov</a>.

- Form 10.4 is a landowner application to encumber their property by a conservation easement.
- Form 10.5 is a landowner application to sell their property in fee simple.
- Form 10.6 is a project proposal with suggested resources to identify the conservation values.
- Form 10.7 is a project proposal supplement required to meet additional IRA grant application criteria.

The appropriate application (10.4 or 10.5) must be completed by the landowner(s) and provided to the Project Advocate (see below for description). The Project Advocate collects the application(s), researches the attributes of the property and creates a project proposal (10.6), and map, which are used for in-state review and ranking. The proposal, application and project map are due to DOF by the due date stated above. Landowners should provide their application for the program to their chosen Project Advocate as early as possible so the Project Advocate can research, prepare and submit the proposal materials by the due date. The DOF Forest Legacy Program coordinator can be contacted by landowners to discuss selection of a Project Advocate or general questions about the program.

# Virginia Forest Legacy Program

### Introduction

The federal government established the USDA Forest Service Forest Legacy Program with the intent to partner with state governments in identifying and protecting important private forested lands through conservation easements and fee simple land purchases. A conservation easement is a voluntary legal agreement between a landowner and a government agency or land trust that permanently limits future development of the land to protect its conservation values. Conservation easements allow private individuals to retain ownership, while providing for the conservation of forested lands. Fee simple purchases provide for additional state properties, held in the public interest, to be maintained and managed as working forests, natural areas or wildlife management areas. Both tools provide the Commonwealth's private landowners the opportunity to help conserve important forested lands, in perpetuity, for future generations.

Successful applicants may be awarded a grant in an amount up to 75% of the appraised conservation easement value, or up to 75% of the appraised property value if a fee simple purchase, based on federal appraisal standards.

# **Application Process**

Landowners interested in the Forest Legacy Program must prepare an application for the program and choose a Project Advocate to research the property's attributes utilizing a multitude of statewide and national databases to identify the conservation values, prepare a competitive project proposal and a Geographic Information System (GIS)-quality map of the property. The Project Advocate may combine several properties (ownerships) into a single proposal to increase the competitiveness of the project.

The Project Advocate is often a non-profit land trust or other private land conservation organization but may also be the land conservation staff of a governmental entity or any other interested organization. These organizational entities have staff and resources that allow for improved GIS map making and conservation value identification, both necessary in the competitive state and national application review process. Project Advocates also utilize the collective knowledge and experience of

Virginia's robust land conservation organizations and agencies. The DOF Forest Legacy Program coordinator can be contacted by landowners or Project Advocates to request project feedback while crafting a proposal.

# **Program Information**

# **Projects and Tracts**

Proposals for the Forest Legacy Program are offered as a project, which may be a compilation of several individual tracts (sometimes with separate ownerships) that have some logical connection. This connection might be that the tracts fall within the same minor watershed, are located within a land trust focus area, are within an area designated by the locality as a conservation area, are located adjacent to or contribute to protected land through prior federal or state investments or collectively contribute to the conservation of an important resource designated by a land conservation organization as worthy of conservation.

Tracts consist of the individual property offered by a single landowner (in the application) for grant program consideration and consist of one or more county tax map parcels. To be considered, **each individual property or tract requires a completed application (10.4 or 10.5) and project proposal (10.6)**.

### **Forest Legacy Areas**

Tracts are eligible for the program if they are located wholly or partially within the Forest Legacy Area (FLA) for the state. A map of the current FLA is found in the appendix of this document (FLA shown in green). The potential landowner applicant or the Project Advocate should examine the map to determine if the tract appears to be within the FLA. If the eligibility of the tract cannot be determined from examining this map, contact DOF to determine if the tract falls within the FLA.

### **Program Requirements**

Each tract approved in the Forest Legacy Program must meet the following conditions:

- The tract of land must be 50 acres in size or larger (nationally competitive tracts are often much larger).
- The tract must be at least 75% forested (or the landowner must be willing to plant trees on open fields to meet this percentage).

Landowner(s) participating in the Forest Legacy Program must:

- Be a "willing seller".
- Be willing to encumber their property with a perpetual conservation easement or be willing to sell their property in fee simple.
- If a conservation easement, allow annual on-site monitoring of the property.
- Be willing to sell the easement or fee simple rights at less than the full appraised value according to federal appraisal standards (Uniform Appraisal Standards for Federal Land Acquisitions).
- Be willing, if program administrative funds are not adequate, to pay a portion of the due diligence costs necessary to acquire the conservation easement or land in fee simple by having these costs deducted from the amount offered for the purchase.
- Be willing to pay for a survey of the property if an area less than an entire tax parcel (or multiple entire tax parcels) is offered for the program, or if the acreage of the property offered cannot be validated.

- Be willing to sign a non-binding letter of intent, prior to national project review, showing commitment and interest in placing a conservation easement on, or selling, their land.
- In the case of an easement, provide a Forest Stewardship Management Plan or multiple-resource forest management plan for the property for review by DOF and the USDA Forest Service prior to closing; it may be necessary for the landowner(s) to pay the cost of preparing the plan.

### **Program Funding**

DOF's FLP is a federally funded land conservation grant program through the USDA Forest Service. This federal grant program receives annual funding from the federal Land and Water Conservation Fund (LWCF). DOFs FLP would traditionally administer a single annual grant application cycle geared towards receiving project proposals, reviewing them and putting forth projects to compete nationally for the available USDA Forest Service LWCF funding. In 2022, the passage of the Inflation Reduction Act (IRA) by the U.S. Congress included an additional funding source for the USDA Forest Service Forest Legacy Program that became available for grants in 2023. As a result, DOFs FLP added two additional application cycles (spring and fall) geared towards the special USDA Forest Service IRA funding. Both federal funding sources (LWCF and IRA) are similar as they fall under the USDA Forest Service Forest Legacy Grant Program, but the IRA funding does contain some differing eligibility criteria for proposed projects.

### Special Requirements Under the Inflation Reduction Act Funding

The Forest Legacy Program's special funding stream under the Inflation Reduction Act (IRA) has special eligibility criteria for each of its three categories of funding. Any proposal must fall into one of the three categories:

- 1. Large Landscape Projects (either conservation easement or fee simple acquisitions, all tracts held by a single legal owner)
- 2. State-Tribal Partnership Projects (fee simple acquisitions only)
- 3. Strategic Small Tract Projects (either conservation easement or fee simple acquisitions)

Please review the full explanations of project types, funding amounts and special eligibility criteria found in the appendix to this document. You must indicate your chosen category within the Form 10.7 Forest Legacy Program Property Proposal Inflation Reduction Act (IRA) Funding Supplement and explain how your proposed project meets the chosen category criteria. The DOF Forest Legacy Program coordinator can be contacted by landowners or Project Advocates to discuss IRA special eligibility criteria further.

# **Proposal Format**

A project proposal is prepared by the Project Advocate and includes pertinent information about the conservation values of the tract(s) as well as the relevant relationship to the surrounding landscape. The information provided should be broken into the four major categories that correspond to the USDA Forest Service FLP review criteria: **importance**, **threatened or strategic**, **along with the special emphasis criteria related to the IRA funding**. Each one of these categories should be populated with the corresponding data/information that the Project Advocate assembles about the tract(s) to describe what makes the property worthy of state protections using federal investments. See the FLP property proposal (10.6) (found as an addendum to this RFP) to provide this information for each tract that is part of a proposal in the specific format required within the USDA Forest Service Forest Legacy Information System where project proposals will ultimately be submitted if selected for advancement within the State review process.

# Offering a Proposal

# Required Contents of a Proposal

A proposal for the FLP IRA application must contain these four (4) elements:

- 1. One (1) original **Form 10.6 Forest Legacy Program Property Proposal** for each property (ownership) being offered for consideration
- 2. One (1) original Form 10.7 Forest Legacy Program Property Proposal Inflation Reduction Act (IRA) Supplement for each project being offered for consideration
- One (1) originally signed (by the respective landowner(s)) Form 10.4 Forest Legacy Program Application –
   Conservation Easement <u>OR</u> 10.5 Forest Legacy Program Application Fee Simple Purchase for each property (ownership) that is being offered for consideration
- 4. A **GIS-quality map** showing the location of each property (ownership) being offered, their proximity to each other and to federal, state and local conservation boundaries, focus areas or other conserved lands

# Process for Advocates to Submit Proposal Packages

A completed proposal package for the program must be submitted by the due date (see page 1).

**Electronic Document Submission Only.** E-mail all required applications and forms, including landowner signatures. Send application documents to: <u>justin.altice@dof.virginia.gov</u>

Delivery must be received by the due date by 5:00 p.m.

# Proposal Review and Ranking

# State Review and Ranking

Submitted proposal packages are reviewed by Virginia's Forest Stewardship Coordinating Committee shortly after submission. Project Advocates will be expected to present the proposal at this meeting and will be notified of the scheduled day for the meeting (tentative date at the beginning of April).

State ranking is based on the information found in the project proposal. In addition, the committee may have questions related to the project that can be answered during the proposal presentation. The Proposal Evaluation Sheet, located in the Appendix to this document, is used to score and rank the proposals received.

The Virginia Forest Stewardship Coordinating Committee can recommend up to five IRA proposals- (1 Large Landscape, 1 Tribal Partnership, and up to 3 Small Strategic) to the State Forester for review, approval, final ranking, and submission to the USDA Forest Service. All proposals will be notified of the outcome. There will likely be another IRA application cycle in fall 2024 and a LCWF funding application cycle in summer 2024.

# National Review, Ranking and Possible Funding

The Project Advocate is typically responsible for entering project proposals that are being submitted for national review and ranking into the USDA Forest Service Forest Legacy Information System (FLIS). In addition, the Project Advocate must finalize all letters of support from supporting parties for the proposal at time of national submission and may ask the landowner for assistance with generating these letters. Additional guidance can be provided to the Project Advocate by DOF at this juncture.

For each proposal submitted for national review, a comparative market analysis, must be completed. The market analysis will include information about who prepared it, the date of the market analysis, information used and the source of that information. This must be in writing, and it must be submitted to DOF and the US Forest Service before the national submission due date which is in May.

A National Panel composed of representatives from across the country will convene to consider and rank projects submitted by the states. Announcement of grant awards is anticipated in Fall 2024.

## Information and Assistance

For more information about the USDA Forest Service Forest Legacy Program, visit: http://www.fs.fed.us/spf/coop/programs/loa/flp.shtml

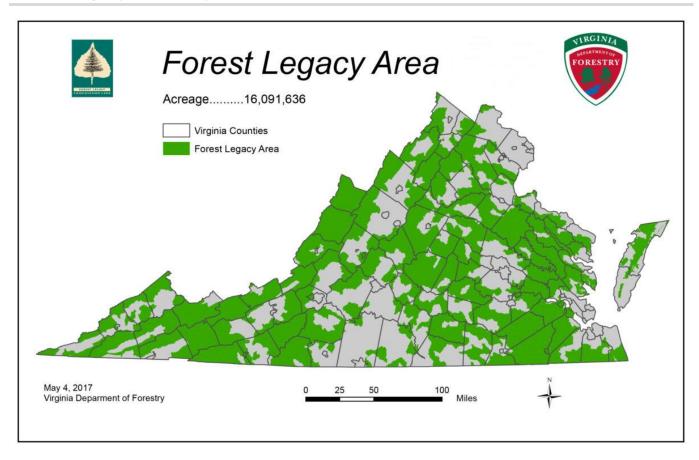
For questions or assistance, contact Virginia Department of Forestry:

Justin Altice, Forest Legacy Program Coordinator

Phone: (434) 534-4087, E-mail: justin.altice@dof.virginia.gov

# Appendix

# Forest Legacy Area Map



For an online, interactive version of this map, go to: <a href="https://arcg.is/9bbie">https://arcg.is/9bbie</a>

# Virginia Forest Legacy Program Proposal Evaluation

| Proposal Evaluation Sheet Example (Core Criteria)   |        |
|---|--------|
| Property/Project:   |        |
| Landowner Name(s):  |        |
| County/City   |        |
| County/City: Acres: Date of Evaluation:   |        |
| Importance Scoring (30 points maximum)  |        |
| Economic Benefits from Timber and Potential Forest Productivity:  Land managed according to a Forest Management Plan. Land is 3rd party certified (e.g., SFI, FSC, Tree Farm, etc.). Forestry activity contributes to resource-based economy. Contains characteristics (e.g., slope, soils, etc.) to sustain a productive forest.                             | Points |
| Economic Benefits from Non-Timber Products:  Provides non-timber revenue to the local or regional economy (e.g., hunting leases, non-timber forest products (e.g., pine straw, pine tipping, ginseng collection, etc.), guided tours (e.g., fishing, hunting, bird watching, etc.) and recreation/tourism (e.g., rentals, bikes, boats, outdoor gear, etc.)). | Points |
| Threatened and Endangered Species Habitat:  Property contains documented T & E species (consider numbers shown below during scoring).  Number of Federally Listed Species: Number of State Listed Species:  | Points |
| Fish, Wildlife, Plants and Unique Forest Communities:  Contains unique forest communities as documented by a formal assessment or wildlife conservation plan or strategy.   | Points |
| Water Supply, Aquatic Habitat and Watershed Protection:  Protects a water supply or watershed (i.e., provides a public drinking water supply, an aquifer recharge area or protects an ecologically important aquatic or marine area, etc.). Contains important riparian area, wetlands, shorelines, river systems or sensitive watershed lands.               | Points |
| <b>Public Access:</b> Will maintain or establish access by the public for recreation (restrictions on specific use or location of activities are okay).   | Points |
| <b>Scenic:</b> Is located within the viewshed of a formally designated scenic feature such as a trail, river or highway.  | Points |
| Historic / Cultural / Tribal: Contains features of historical, cultural and/or tribal significance, formally documented by a governmental or non-governmental organization.   | Points |
| Carbon Sequestration/Climate Resilience, Adaptation to Climate Change: Protection of the property will result in benefits related to climate resilience and adaptation, and carbon sequestration.   | Points |
| Subtotal Points (30 Points Maximum for Importance)  | Points |

# **Threatened Scoring (20 points maximum)**

| Points |
|--------|
|        |
| Points |
| Points |
| Points |
| Points |
|        |
| Points |
|        |
|        |

- Climate Resilience USDA Forest Service will assign each project a score using this national dataset to determine whether, and to what extent, a proposed project contributes to climate resilience: http://maps.tnc.org/resilientland/
- **Disadvantaged Communities** USDA Forest Service will conduct a geospatial analysis for each proposed project using the Climate and Economic Justice Screening Tool: <a href="https://screeningtool.geoplatform.gov/en/">https://screeningtool.geoplatform.gov/en/</a>

# Special Requirements Under the Inflation Reduction Act Funding

# Large Landscape Projects

These projects should focus on large-scale, high-impact opportunities in ecological and economically significant landscapes where a significant federal investment available at one time will achieve a conservation outcome with exceptional public benefits. This opportunity is limited to conservation easement and fee simple acquisition transactions with a single legal entity (individual, family or corporate landowners) with high leverage/non-federal contributions by the landowner, state and other partners.

Proposals may include multiple tracts but they all must be legally held by the same entity or where a single organization exercises legal control for all proposed tracts on land collectively owned (e.g., timber investment management organization). Projects with multiple tracts must be negotiated and executed as a single negotiated transaction to ensure all lands and interests included in the proposal are legally protected.

States may request up to \$50 million of federal funding per project in this category. States may only submit one project for consideration in this category per application cycle. Cost-share waiver or reduction is not available for this funding opportunity.

If a project spans multiple states, then states will need to submit separate proposals for their respective portions of the large project, but it will be evaluated together as a single project, with a total request not exceeding \$50 million of federal funding per state in a single application cycle.

#### Special-Emphasis Criteria for Large Landscape Projects

- 1. **High Impact** Exceptional economic, social and environmental benefits and high strategic importance in a priority landscape aligned with National Core Criteria (as described in preceding sections). Applicants should expand on the exceptional quality and unique strategic benefits of the proposed project to supplement the information provided under the National Core Criteria (Strategic, Threatened, Important).
- 2. National Goals Significant contributions to one or more of the following national goals:
  - a. Climate resilience
  - b. Carbon sequestration
  - c. Habitat connectivity
  - d. Benefits for disadvantaged or tribal/indigenous communities
- 3. **High Leverage** Projects with higher non-federal cost share than the minimum required of 25% will be given greater consideration.
- 4. **Efficiency of Scale** A large investment now will be more cost effective and efficient than phasing over time.
- 5. **High Readiness and Capacity** States will need to demonstrate high readiness and capacity for successful project implementation within three (3) years of grant award. Recent performance and current capacity will be carefully considered.
- 6. **Stewardship Capacity** State has sufficient funding and plans in place for long-term monitoring and stewardship of this large acreage project.

#### **Project Scoring for Large Landscape Projects**

- High Alignment with Special Emphasis Criteria (21-30 points) The project addresses each of the Special Emphasis Criteria (listed above) in a meaningful and persuasive way. The project is exceptionally important and strategic, and is in alignment with program Core Criteria.
- Moderate Alignment with Special Emphasis Criteria (11-20 points) The project addresses each of the Special Emphasis Criteria (listed above) in some way. The project has clear important and strategic values and is in alignment with program Core Criteria.
- Little to No Alignment with Special Emphasis Criteria (0-10 points) The project addresses some of the Special Emphasis Criteria (listed above). The project has some important and strategic values and is in alignment with program Core Criteria.

## State-Tribal Partnership Projects

Projects where the state works in partnership with tribes to identify and conserve lands with high importance and significant benefits for those tribes. This opportunity is open to fee simple acquisitions only. Only privately held lands are eligible for acquisition under this opportunity.

The state and tribe will manage the acquired property together for long-term stewardship, with the terms of the relationship between the state and tribe documented in a formal agreement and/or in the recorded deed. The terms of the partnership agreement between the state and tribe do not need to be finalized at the time of acquisition but do need to be formalized with mutual agreement by closing. The goal of this funding opportunity is to encourage and support meaningful partnerships between states and tribes to identify, acquire and co-manage properties with significant tribal cultural and economic benefits as well as other public benefits.

Acquired lands will be held by the state (or unit of state government) for the purpose of perpetual conservation and joint stewardship in partnership with the tribe (as outlined in the formal agreement and/or deed). States may work with federally and state recognized tribes, as well as equivalent governmental representatives of native indigenous communities. Projects could include lands either near or adjacent to trust lands, or lands in other areas with historical and cultural importance to the partner tribes.

States may request up to \$50 million of federal funding for this project category. States may submit one project within this category per application cycle. Cost-share waiver or reduction is available for this funding opportunity as these projects align with the goal of providing benefits for disadvantaged and tribal communities (see above cost-share waiver/reduction instructions).

#### Special Emphasis Criteria for State-Tribal Partnership Projects

- 1. **Active Engagement of Tribes** Meaningful support and involvement of tribes (beyond letters of support) in the design, implementation and stewardship of the project.
- 2. **Strong Partnerships** Establishes or enhances long-term, stewardship-oriented relationships between states and tribes. There is legal certainty and clarity around the agreement to co-manage the land.
- 3. **Tribal/Cultural Values** Supports the protection of tangible or intangible cultural resources and/or traditions. The state and tribe will work together to manage public access to protect cultural resources and traditions. Tribal members will have access to the property for cultural purposes.
- 4. National Goals Contributions to one or more of the following national goals:

- a. Climate resilience
- b. Carbon sequestration
- c. Habitat connectivity
- d. Benefits for disadvantaged or tribal/indigenous communities
- 5. **High Readiness and Capacity** States will need to demonstrate high readiness and capacity for successful project implementation within three (3) years of grant award.
- 6. **Co-Management** Provides for long-term tribal engagement and co-management in stewardship of the project area. Management plans should incorporate traditional indigenous ecological knowledge/practices to reflect joint-stewardship.

#### Project Scoring for State-Tribal Partnership Projects

- High Alignment with Special Emphasis Criteria (21-30 points) The project was designed in partnership with a tribe/indigenous group and addresses each of the Special Emphasis Criteria (listed above) in a meaningful and persuasive way. The existing relationship and planned co-stewardship with the tribe is clear and well-documented. The project is exceptionally important, offers significant tribal benefits, and is in alignment with program Core Criteria.
- Moderate Alignment with Special Emphasis Criteria (11-20 points) The project was designed in partnership with a tribe/indigenous group and addresses each of the Special Emphasis Criteria (listed above) in some way. The engagement of the tribe in the development of the project is evident but may be lacking some clarity/certainty around future management plans. The project has clear important values, offers tribal benefits, and is in alignment with program Core Criteria.
- Little to No Alignment with Special Emphasis Criteria (0-10 points) —: The project was designed with some tribe/indigenous group input and addresses some of the Special Emphasis Criteria (listed above). The state/tribal relationship and/or continued role of the tribe in co-management is unclear or uncertain. The project has some important values or tribal benefits and is in alignment with program Core Criteria.

# Strategic Small Tract Projects

These projects support the conservation of strategic inholdings or adjacent properties to already conserved lands, including strategic tracts that complement previous Forest Legacy Program investments. Each tract will need to be submitted as a stand-along project, not bundled with other tracts as is allowed under the annual LWCF process. For the purposes of this opportunity, a "tract" is defined as contiguous land under the same legal ownership. States may submit either conservation easement or fee simple acquisitions for this funding opportunity.

Emphasis will be on projects with non-industrial family and individual forest owners, but strategic tracts held by corporate entities may be considered as well.

States may request no more than \$1.5 million of federal funding per tract and per landowner. States may submit three (3) projects within this category per application cycle. Cost-share waiver or reduction is available on a case-by-case basis for this funding opportunity where there are substantial benefits for disadvantaged communities (see above cost-share waiver/reduction instructions).

## Special Emphasis Criteria for Strategic Small Tract Projects

- 1. **High Strategic Value** Inholdings or adjacent properties to already conserved lands (e.g., lands held in federal, state or local public ownership; conservation easements, etc.), including tracts that complement previous program investments.
- 2. **National Goals** Contributions to one or more of the following national goals:
  - a. Climate resilience
  - b. Habitat connectivity
  - c. Benefits for disadvantaged communities
- 3. **Public Access** Public access is expected, with the goal of enhancing public access to existing protected lands where applicable and strategic.
  - a. Public access is access provided on a non-discriminatory basis at reasonable times and places but may be limited to protect cultural and natural resources or public health and safety.
  - b. Exceptions to the public access expectation will be rare and based upon justification of other applicable strategic values (e.g., habitat connectivity, protection of cultural/natural resources, lack of public access on adjacent protected parcels, etc.)
- 4. **High Readiness and Capacity** States will need to demonstrate high readiness and capacity for successful project implementation within 12 months of grant award.
- 5. **Stewardship Capacity** State has sufficient funding and plans in place for long-term monitoring and stewardship of small tracts with multiple landowners.

#### **Project Scoring for Strategic Small Tract Projects**

- **High Alignment with Special Emphasis Criteria** (21-30 points) The project addresses each of the Special Emphasis Criteria (listed above) in a meaningful and persuasive way and provides for public access. The project is exceptionally strategic and is in alignment with program Core Criteria.
- Moderate Alignment with Special Emphasis Criteria (11-20 points) The project addresses each of the Special
  Emphasis Criteria (listed above) in some way. The project has clear strategic values and is in alignment with program
  Core Criteria.
- Little to No Alignment with Special Emphasis Criteria (0-10 points) The project addresses some of the Special Emphasis Criteria (listed above). The project has some strategic values and is in alignment with program Core Criteria.