

# Vital Lands Illinois



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## **GRAND VICTORIA FOUNDATION**

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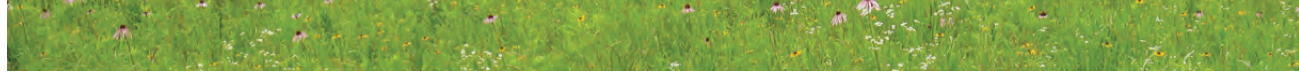
## **Overview**

Vitally important and irreplaceable natural landscapes across Illinois are threatened by development, pollution, and other pressures. These lands are in urgent need of preservation. Grand Victoria Foundation, through Vital Lands Illinois, supports acquisition and preservation of these extraordinary places, with an overall goal of creating a statewide, connected system of natural lands, ensuring their permanent protection and long-term stewardship, and building public support for conservation.

This document describes the land acquisition funding available from Grand Victoria Foundation to support Vital Lands Illinois. It outlines the project criteria, eligibility requirements and application process. Read the guidelines carefully to determine whether your organization is eligible and your acquisition meets the criteria. If you have questions, please contact the Foundation at (312) 609-0200.

This grant program is part of a broader effort to reform land conservation and ensure public commitment to the long-term preservation of Illinois' vital landscapes. For more information on this broader effort and how to get involved, visit [www.grandvictoriafdn.org](http://www.grandvictoriafdn.org).

# Project Criteria



These funding criteria were drafted through an extraordinary collaboration with land conservation leaders across Illinois. They are intended to help ensure the permanent protection and long-term stewardship of Illinois' most vital lands and build support for conservation among public, private, and nonprofit organizations, other potential donors, and the broader public. Because requests for funding can be as varied as the landscapes they seek to protect, the criteria provide flexibility while setting a high bar with strong minimum standards.

Many criteria are presented in a “good, better, best” format that identifies Basic Requirements, a Preferred set of characteristics, and Best Possible options. Projects must meet Basic Requirements, not Best Possible criteria, in order to receive funding. On the other hand, projects with Preferred and Best Possible characteristics will be given higher priority.

Land conservation means more than mere land acquisition. Conservation requires sound, science-based planning, stewardship, defense, and broad public support. Accordingly, project expenses associated with long-term stewardship and defense of the land acquired through Vital Lands Illinois as well as public engagement will be eligible for support. More information about eligible project expenses is detailed in the [Budget Guidelines](#) section on page 10.

## 1 Permanent Protection

All projects submitted to Vital Lands Illinois for support must permanently protect land. Evaluation of the permanence of the proposed protection strategy and the adequacy of the monitoring and defense funds identified shall be guided by current recommendations of the Land Trust Alliance.

Acceptable protection options include:

- a) Fee acquisition by an organization with a conservation mission- and with a plan outlined in the request for long-term stewardship and defense (including financial support for these expenses). Applicants are strongly encouraged to include a plan for a back-up conservation owner or easement holder to ensure adequate protection of the land in perpetuity. Acceptable plans include, but are not limited to: 1) subsequent transfer to a [government agency with a conservation mission](#)\* and 2) long-term ownership by the conservation organization with adequate monitoring and defense funds identified. Enrollment of eligible parcels as [Illinois Nature Preserves Commission](#) Land and Water Reserves or Nature Preserves is strongly encouraged.
  
- b) Conservation easements held by a qualified 501(c)(3) organization with adequate monitoring and defense funds identified. Designation of otherwise unprotected private property as an Illinois Nature Preserves Commission Land and Water Reserve or Nature Preserve will also qualify.

## 2 Conservation Values

Projects must contribute to the overarching goal of creating a connected system of natural lands in Illinois. The following criteria will be used to evaluate that contribution.

- a) The parcel provides potential or existing habitat.

BASIC REQUIREMENT	PREFERRED	BEST POSSIBLE
Potential habitat functions and values (i.e., the parcel can be restored)	Presence of high quality habitat or parcel has been restored to high quality habitat	<a href="#">Illinois Natural Areas Inventory</a> site

\* For terms in blue, see *Definitions* on page 17.

- b) The area being protected is large enough to sustain the primary conservation values it is intended to conserve.

BASIC REQUIREMENT	PREFERRED	BEST POSSIBLE
<u>Project area</u> is of sufficient size that its conservation values remain intact.	The <u>parcel</u> and other protected lands within the project area are of sufficient size and ecological connectivity that its conservation values remain intact.	The parcel is of sufficient size that its conservation values will remain intact.

- c) The acquisition contributes to the goals of the Illinois Wildlife Action Plan (IWAP) and the applicant organization or long-term owner has a conservation plan in place for the area in which the parcel is located.

BASIC REQUIREMENT	PREFERRED	BEST POSSIBLE
Contributes to at least one campaign of the IWAP <i>and</i> a <u>conservation plan</u> written by the applicant organization or long-term owner of the parcel exists for the project area.	All criteria from Basic <i>and</i> parcel is within a conservation area identified in a regional, county or local plan.	All criteria from Preferred <i>and</i> parcel is within an IWAP Conservation Opportunity Area or an Illinois Resource Rich Area with a conservation plan developed by an Ecosystem Partnership or similar organization.

d) Projects with an array of conservation values and/or **public benefits** will be prioritized. Because public engagement and understanding are critical to the future of land conservation in Illinois, applicants (or the long-term owner) must have a strategy for including the parcel (and the public benefits of its protection) in the organization's public outreach activities.

BASIC REQUIREMENT	PREFERRED	BEST POSSIBLE
<p>Parcel or project area provides opportunity and applicant has a plan for public outreach <i>and</i> at least one of the following:</p> <ul style="list-style-type: none"> <li>- scenic value</li> <li>- historic value</li> <li>- cultural value</li> <li>- protects surface or ground waters</li> <li>- provides for public recreation or education</li> <li>- confirmed site for active scientific research</li> </ul>	<p>Parcel or project area provides two or more from Basic list <i>and</i> provides an opportunity for public education.</p>	<p>Meets criteria from Preferred <i>and</i> provides opportunity for public access for outdoor education or recreation consistent with conservation purposes.</p>

- e) Applicants (and long-term owners if applicable) have the capacity and financial ability to complete the transaction, implement conservation plans, and ensure the long-term stewardship and defense of the property. Applicants should be prepared to demonstrate by submitting copies of relevant written policies that they have adopted and implemented the [2004 Land Trust Alliance Standards and Practices](#). Proposed holders of a conservation easement also must have a demonstrated ability to perform annual monitoring and negotiate resolutions to suspected easement violations.

BASIC REQUIREMENT	PREFERRED	BEST POSSIBLE
<p>Applicant is a 501(c)(3) that has adopted Land Trust Alliance Standards and Practices and has <a href="#">conservation programs in Illinois</a>.</p> <p>Long-term owner/easement holder has the capability (skills and knowledge) and capacity (staff or access to other help) to carry out long-term management.</p>	<p>Applicant meets all Applicant criteria from Basic Requirements, <i>and</i> has successfully completed similar projects and/or has involved an experienced Illinois partner in this transaction.</p> <p>Long-term owner/easement holder has capability and capacity to carry out long-term management <i>and</i> a long-term management plan is in place.</p>	<p>Applicant meets all criteria from Preferred <i>and</i> holds LTA accreditation.</p> <p>Long-term owner/easement holder meets all criteria from Preferred, <i>and</i> has staff, volunteers, or other personnel for management and dedicated funds or designated income stream in place for this parcel.</p>

### 3 Location

Because a parcel’s location can create additional conservation benefits, applicants are encouraged to describe the parcel’s relationship to other protected/important lands, including whether it is a [linchpin](#), in-holding, buffer, connector, or gateway.

## 4 Public Engagement

Preference will be given to projects that build support for conservation in the broader community. Applicants should describe whether and how the resources being protected, the connections being created with the broader community, or other outcomes advance the work of the organization or of conservation generally. Projects can include communications to reach key audiences in the local community or beyond in order to:

- Ensure the permanent protection of the parcel and/or important surrounding or buffer areas
- Identify volunteers to assist with stewardship
- Raise new funds
- Expand the benefits of this project or
- Motivate additional land protection in the immediate project area or beyond

[Public Engagement Examples](#) can be found on page 15.

## 5 Partnerships

One of the primary goals of Vital Lands Illinois is to decrease fragmentation in the community of organizations and institutions that conserve land in Illinois, and to broaden that community to include non-traditional entities. Accordingly, projects being pursued by substantially engaged partners are strongly encouraged. Applicants should describe any partners committed to the project and the expertise or resources they will contribute.

## 6 Funding Sources

Because multiple funding sources help ensure that a project is broadly supported and sustainable over the long term, Grand Victoria Foundation is unlikely to be the sole funder on a project. Applicants will be asked to describe all the pending and secured financial commitments to the project. Strong preference will be given to projects that have or are likely to attract additional public and private financial support.



# Eligibility



Applicants must be well-managed, fiscally healthy 501(c)(3) public charities or certified public institutions, registered in Illinois and in good standing. 501(c)(3) organizations seeking land acquisition funding must have conservation programs in Illinois and have adopted the [Land Trust Alliance Standards and Practices](#). In the application process, organizations will be asked to describe and document their implementation of LTA Practices 6F and 6G.

If invited to submit a full proposal, applicants must be prepared to provide the following documentation:

- a) IRS Form 990 for most recent fiscal year
- b) Audited financial statements for most recent fiscal year
- c) Current fiscal year's overall organizational budgets. Organizations submitting a request during the last quarter of their fiscal year should submit the next fiscal year's budget as well.
- d) Year-to-date statement of revenue and expenses, plus balance sheet
- e) 501(c)(3) tax ID number
- f) Staff list
- g) Board of directors list, including contact information and business affiliations
- h) Confirmation of the organization's adoption of Land Trust Alliance Standards and Practices. A copy of a Board resolution may be submitted as confirmation.
- i) If a conservation easement is being purchased, the organization's (long-term easement holder's) Easement Monitoring Policy

# Budget Guidelines



Applicants will be asked to submit a detailed project budget, including acquisition, stewardship, and defense costs, and to explain how the stewardship and defense costs were calculated. The project budget or accompanying narrative should list all the funding obtained or requested for the project, the source of the funds, and the status of the request. The budget should include a narrative explanation of line items that may be unclear to us.

The following reimbursable expenses may be included in the project budget:

- a) Purchase price
- b) Survey
- c) Appraisal
- d) Phase I Environmental Site Assessment (if performed)
- e) Title policy
- f) Closing costs
- g) Attorneys' fees
- h) Staff time
- i) Dedicated long-term [stewardship funds](#)\*
- j) Dedicated defense funds (for conservation easement)
- k) [Public Engagement](#) costs

\* Grand Victoria Foundation will provide no more than 30 percent of the total dedicated funds needed for long-term stewardship and defense. Organizations seeking such funds must demonstrate their compliance with LTA Practices 6F and 6G. Organizations that do not seek such funds will be required to describe in their proposal how long-term stewardship and defense costs will be funded.

# How to Apply



## 1 Project Application

To be considered for funding, please complete the **Project Application** and email it to the Foundation. Applications may be submitted at anytime to **[vitalandsillinois@grandvictoriafdn.org](mailto:vitalandsillinois@grandvictoriafdn.org)**.

## 2 Full Proposal (If Invited)

Eligible organizations with projects that meet the minimum requirements will be invited to submit a full proposal. Organizations will be notified in writing of this decision. Proposals require a detailed narrative describing the organization and the project, along with related documentation.

## 3 Foundation Review

Proposals will be reviewed by Foundation staff and a Technical Review Committee of professionals with a variety of relevant expertise. Committee members will not be affiliated with organizations seeking funding through Vital Lands Illinois.

Grand Victoria Foundation will make land acquisition grants through the Vital Lands Illinois program on a rolling basis. Grantees will be contacted by Foundation staff as soon as funding decisions are made.

# Frequently Asked Questions



**1. Can a funding request include funds for stewardship of the land being protected and defense funds?**

Yes. The project application materials have instructions for developing the project budget.

**2. Are lands that will not qualify for designation as a Land & Water Reserve or Illinois Nature Preserve by the Illinois Nature Preserves Commission eligible for funding?**

Yes. These designations are offered only as examples of acceptable strategies for permanently protecting land. Any transaction that provides for permanent protection of a parcel of land may be submitted for funding.

**3. How important are back-up plans for the conservation owner or easement holder? What requirement, if any, is there for documentation of back-up conservation owner plans? Would lack of an adequate plan preclude a grant application?**

Having an adequate back-up plan is an important part of the application. Grand Victoria's view of the adequacy of the plan will be guided by the Land Trust Alliance Standards and Practices as well as other LTA publications regarding best practices in this area. Standards 11 (conservation easements) and 12 (fee lands) address this issue. For example, Practice 12G, Contingency Back-up, provides: "The land trust has a contingency plan for all of its conservation land in the event the land trust ceases to exist or can no longer manage the property."

#### **4. What do you mean by “status in relation to the Illinois Wildlife Action Plan”?**

This question is a shorthand way of asking: Does the project further any of the specific goals identified in IWAP? Does the project contribute to any of the Campaigns outlined in IWAP? Is it located within a Conservation Opportunity Area? The full text of IWAP is available here: [http://dnr.state.il.us/ORC/WildlifeResources/theplan/final/Illinois\\_final\\_report.pdf](http://dnr.state.il.us/ORC/WildlifeResources/theplan/final/Illinois_final_report.pdf)

#### **5. Are projects to protect farmland eligible?**

To be eligible, a project must meet the Basic Requirements outlined in the Guidelines. Those criteria include a requirement that an acquisition contribute to one of the Campaigns of the Illinois Wildlife Action Plan. The Wildlife Action Plan includes a “Farmland and Prairie Campaign” and a “Green Cities Campaign,” both of which provide opportunities for projects in these landscapes. That being said, the participants in Vital Lands Illinois have prioritized natural lands protection.

#### **6. Why must applicant organizations comply with Land Trust Alliance’s Standards and Practices?**

LTA’s Standards and Practices are recognized in the land protection community, by the Internal Revenue Service, and by other regulatory agencies as the best practices in the land protection industry.

#### **7. You request both current and future fiscal year budgets. We don’t develop next year’s budget until the end of our fiscal year.**

We understand that the future year budget is a projection, but it helps us understand in what direction an organization thinks it is headed. It allows us to see a progression from the prior year, through the current year, and into the future. If an organization hasn’t done any thinking about the budget for the next year, that can sometimes be a concern. The Guidelines require organizations in the final quarter of their fiscal year to submit a budget for the next fiscal year.

**8. What type of documentation would you want to confirm that we have adopted the LTA Standards and Practices?**

A board resolution is sufficient.

**9. Can you provide a good example of an easement monitoring policy?**

LTA has published a comprehensive book with example documents (monitoring checklists, procedures, etc.). It is available at: [http://  
\*\*learningcenter.lta.org/attached-files/0/71/7143/CESteward\\_Small.pdf\*\*](http://learningcenter.lta.org/attached-files/0/71/7143/CESteward_Small.pdf)

# Public Engagement Examples



The following are examples of ways in which Illinois organizations have used acquisitions to pursue broader organizational goals and/or build support for conservation in the local community:

## **Build Membership and Support**

*The Land Conservancy of McHenry County* is planning a members barbeque at its recently acquired site, the West Woodstock Prairie natural area. *Ducks Unlimited*, which cooperated in the project, is also planning a members event there. The idea is to introduce members to the site and build enthusiasm by demonstrating success. The Land Conservancy is also planning a reception for local community leaders in Woodstock to announce the project, attract attention to their work, build relationships, and earn goodwill for future projects.

When a *Ducks Unlimited* land protection project was designated as a waypoint on the Illinois River Road National Scenic Byway, the group began planning a parking lot and interpretive signage to assist future visitors and is working to get coverage in the local newspaper. The story will be shared with the local Economic Development Council and Byway Board of Directors, each of which is made up of community and corporate leaders from the local area. Leaders will be asked to assist in securing financial support for future conservation projects.

## **Facilitate Other Deals**

*The Liberty Prairie Conservancy* packages the stories and testimonials of landowners who have worked out conservation deals, including two families involved in recent deals who wish to remain anonymous, and uses them to communicate with other landowners about conservation options. The Conservancy presented the material at workshops which attracted over fifty attendees and other expressions of interest, and posted the stories on its website, [www.libertyprairie.org](http://www.libertyprairie.org).

*The Natural Land Institute* used the announcement of a recent conservation easement in an area north of Mississippi Palisades Park to communicate to landowners in surrounding Carroll County about the financial advantages of such conservation deals. As a direct result, the Institute has accepted two donated conservation easements to date and has been contacted by other landowners also interested in donating easements.

### **Raise Money**

*The Great Rivers Land Trust* put together a video and a booklet about its recent acquisition of the Palisades Preserve and is using it to raise money for another parcel in the area.

### **Advance Other Conservation Agendas**

*The Natural Land Institute* timed announcement of its acquisition of a portion of Milan Bottoms to coincide with the Upper Mississippi River Conference in Moline in August 2008. The Institute hired a wildlife photographer to document the natural richness of the area for a display at the conference, met with state legislators and city planning staff to inform them about the acquisition, and secured major coverage in the *Quad City Times*. The media attention, they hope, will ensure that local officials pay more attention to the impact of future development on the wildlife refuge. They also hope that introducing legislators to their efforts to preserve this area will help build support for sorely-needed conservation funding in the future.

A workshop hosted by *Ducks Unlimited* and partners at a historic duck club briefed outdoor writers about the [Illinois Wildlife Action Plan \(IWAP\)](#), and the writers were taken on a tour of two land acquisition projects tied to the plan. The conservation groups shared resulting newspaper articles with members of the Illinois Legislative Sportsmen's Caucus and met with the Caucus to highlight IWAP funding concerns and necessary actions. Legislation was introduced to restore funds critical to IWAP.



# Definitions



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## Conservation Plan

A conservation plan describes the current status of a certain species (or group of species), population objectives for those species, habitat conservation issues and objectives, and monitoring needs. Conservation plans for projects submitted to Vital Lands Illinois should comply with Land Trust Alliance Standard 8G (Documenting Conservation Values).

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## Conservation Programs in Illinois

The Basic Criterion #2e requires that organizations seeking funds through Vital Lands Illinois have current Illinois staff and have conducted land-conservation-related activities in Illinois prior to requesting funding.

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## Government Agency with a Conservation Mission

Those government agencies that have as one of their primary purposes protection of land in order to preserve natural resources. Forest Preserve Districts in Illinois, the Illinois Department of Natural Resources, and the U.S. Fish & Wildlife Service are examples of such agencies.

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## Illinois Natural Areas Inventory

A statewide inventory of the highest quality, intact natural areas in Illinois maintained by the Illinois Department of Natural Resources (currently being updated with Foundation support by the Illinois Natural History Survey).

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## Illinois Nature Preserves Commission

The Illinois Nature Preserves Commission was created by the Illinois Nature Preserves Act, 525 ILCS 30/1, to secure natural areas for current and future generations. The nine-member Commission functions as part of the Illinois Department of Natural Resources. It designates and then provides ongoing stewardship and defense for a statewide system of high quality, protected natural areas. The Act bestows very significant legal protections upon designated properties, backed up by the enforcement powers of the Illinois Attorney General. The Commission's two designations, *Land & Water Reserve* and *Nature Preserve*, function as conservation easements. Public and private landowners may enroll qualifying properties

in these programs. For more information, visit the Illinois Nature Preserve Commission's website at <http://dnr.state.il.us/INPC>.

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**Illinois Wildlife  
Action Plan (IWAP)**

To qualify for federal funding for state wildlife conservation, each state had to develop a comprehensive wildlife conservation plan. These plans outline goals and objectives for stewardship of all wildlife species, with special attention to species in greatest need of conservation. The Illinois Wildlife Action Plan has been recognized as one of the best in the country. Developed with input from 150 agencies and organizations, the plan includes campaigns to address: Farmland & Prairies, Forests, Wetlands, Streams, Invasive Species, Land and Water Stewardship, and Green Cities.

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**Land Trust Alliance  
Standards and Practices**

These are guidelines for the responsible operation of a land trust, which is run legally, ethically and in the public interest and conducts a sound program of land transactions and stewardship. The Land Trust Alliance originally developed the standards and practices in 1989; they were last revised in 2004. For more information, visit the Land Trust Alliance's website at <http://www.landtrustalliance.org/learning/sp>

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**Linchpin**

A parcel that, if lost, would have significant negative impacts on neighboring natural areas or, if secured, opens the door for future important deals.

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**Parcel**

The property that is being acquired.

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**Project Area**

An area of land identified by the applicant organization(s) needed to achieve a specific conservation objective. Project areas usually comprise a number of individual properties or parcels. Examples of such project areas from projects previously supported by Grand Victoria Foundation include Milan Bottoms, Emiquon, and the Cache River Basin.

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**Public Benefits**

Not to be confused with the term as used in the Internal Revenue Code, this category is intended to gauge the value of a project beyond protection of an ecologically important property and to identify project benefits beyond the primary conservation values being served through the acquisition. The criteria in this category have been drafted to push applicants to consider how their work can engage or benefit a surrounding community and, perhaps, tell a story about the importance of conservation to a broader

audience. Examples of such benefits might include: protection of an aquifer or groundwater recharge area; providing resources that support local eco-based tourism efforts; preserving important historical or cultural sites; or supporting local outdoor education programming.

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## **Stewardship Funds**

The Foundation's use of this term is informed by the guidance Land Trust Alliance has provided through the Standards and Practices curriculum. In project budgets, the Foundation is willing to support the applicant's efforts to raise the funds needed for the long-term care of the property. Examples of eligible expenses include: marking and maintaining boundaries, signage, monitoring the site regularly, paying taxes, carrying insurance, and protecting the important conservation attributes of the property. Routine land management activities, such as burning or invasive species control, would be included; extensive restoration expenses would not. Because building a broad constituency for the organization and its individual holdings is important, the Foundation will provide no more than 30% of the total dedicated funds needed for long-term stewardship. When requesting stewardship funds, the applicant should describe how the costs were calculated.

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