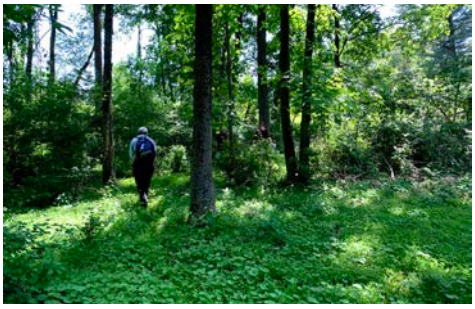
Montco Forever Green

Montgomery County Open Space Grant Program

Program Guidebook 2026



















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Harriet Wetherill Park, Plymouth Meeting

Part 1. Program Description

Montgomery County's Open Space Grant Program, *Montco Forever Green*, provides county funding assistance for open space preservation projects across the county. The grant funding is available for both fee title and conservation easement acquisitions by municipalities and qualified nonprofit land conservation organizations. The grant program offers funds sourced from an annual allocation in the county's Capital Improvement Program, as approved by the Montgomery County Board of Commissioners (County Commissioners).

Open space preservation is a popular ambition with an extensive history of countywide support. Strategic preservation provides economic, environmental, and health benefits as detailed in the 2022 county report, ***Return on Environment: The Economic Impact of Protected Open Space in Montgomery County, Pennsylvania***. The open space grant program will improve public awareness of these benefits, create more equitable opportunities for preservation across the county, and increase the sheer amount of land preserved for current and future generations.

Due to the variability of timing involved with open space preservation projects, grants will be provided in a timely manner that best supports the ability of the applicant to leverage and secure funding from other sources and settle the transaction, subject to the procedures in this guidebook.

The grant program is administered by Montgomery County Planning Commission's (MCPC) Trails and Open Space Section staff in coordination with the county's Open Space Board (OSB). The OSB determines which applications it will recommend for approval by the County Commissioners.

Any questions or concerns should be directed to:

Bill Hartman, MCPC Trails & Open Space Planning Manager
bill.hartman@montgomerycountypa.gov
610-278-3746

Part 2. Eligibility

A. APPLICANTS

All 62 municipalities in Montgomery County are eligible to apply for open space grants as the primary applicant. Additionally, land trusts and other qualified nonprofit organizations that include land conservation as part of their mission and have a history of land conservation are also eligible to apply. Eligible nonprofit organizations do not need to be headquartered in the county but must include the county as part of their geographic program area. Nonprofit organizations which do not solely focus on open space preservation but include it as a related aspect of their mission (e.g., historical societies, environmental education nonprofits) may also apply. Entities such as authorities, commissions, school districts, special taxing districts, private organizations, individuals, or other similar entities, are not eligible to apply for these funds.

1. Each application must be submitted by a representative of the municipality (and approved via resolution by the head of the governing body) or by a representative of the nonprofit organization (and approved via resolution by the organization's governing board). The applicant will bear all responsibility for completing the project if a grant is awarded.

2. Applicants may partner with other public agencies, nonprofit organizations, or private entities, but the primary applicant will be responsible for administering the grant.

3. An applicant may submit and have under review up to two (2) applications at a time.

4. Municipalities may submit a multi-municipal application for projects that are collaborative across local boundaries. Each municipality participating in a multi-municipal grant will be

considered a grantee for administrative purposes and will have the same opportunities and obligations under this program. However, one municipality must be designated as the primary applicant for the simplicity of administering the grant.

B. COSTS

1. **Eligible Costs:**
    a. The county grant funds shall be solely used for real estate acquisition within Montgomery County, including fee title and conservation easement acquisitions.
    b. Project-related expenses may be utilized to meet the required match of the county grant but are not eligible for direct county grant funding or reimbursement. Matching grant funds may cover the following costs:
        i. Appraisal(s).
        ii. Boundary survey(s) ordered by and prepared for the applicant.
        iii. Legal work associated with closing on the land or easement, preparation and review of legal documents, performing title work, and preparing sales agreements or option to purchase.
        iv. Title commitment report and insurance.
        v. Phase 1- Environmental Site Assessment.
        vi. Baseline Documentation Report for a conservation easement.
        vii. Buyer's settlement costs and pro-rated taxes.
    c. All project costs must be supported by properly executed vouchers, invoices, cancelled checks, and other records detailing the nature and propriety of the charge. Land and easement acquisition costs incurred prior to the grant award are not eligible for county grant funding/reimbursement.

2. **Ineligible Costs:**
    a. Ineligible costs include but are not limited to:
        i. Grant application preparation.
        ii. Applicant negotiations with the landowner.
        iii. Postage, photocopying charges, and printing.
        iv. Fundraising or lobbying activities.
        v. Food, drink, gifts and/or other hospitality items related to the general promotion of the applicant's organization and/or project.
        vi. Seller's normal settlement costs.
        vii. Land acquisition costs for property acquired by deed (including declarations of taking) prior to County Commissioners approval.
        viii. Staff salaries as well as operating or administrative costs for maintaining the entity applying will not be allowed as part of the match.
        ix. Structures and underlying land.
        x. Plans and studies, including feasibility studies, except as noted under eligible costs for match funding.
        xi. Demolition of structures/buildings.
        xii. Endowment or maintenance.
        xiii. Land subdivision.
        xiv. Purchase of property which is known or suspected to be contaminated with hazardous substances or waste, unless the property has received appropriate environmental clearances (i.e., DEP and EPA clearances) suitable for the proposed use and the municipality has a remediation plan in place.
        xv. First appraisal if a technical review determines there are significant errors in the first appraisal and a second appraisal is required.
        xvi. A program that would disburse the awarded funding as grants or loans to subgrantees.

C. PROJECTS

Overview of Potential Projects

Under this grant program, funds are made available to both municipal governments and qualified nonprofit organizations for the perpetual preservation of open space, expansion of existing preserved open space, and/or cultural landscapes. With the exception of land that already possesses adequate and perpetual protection as open space, as determined by MCPC staff, any land within Montgomery County may be eligible for acquisition as open space under this grant program provided that the need or value of the land as open space can be justified as part of the municipality's or county's open space system.

Potential open space projects will include any open land, whether privately or publicly owned. Open space may provide ecosystem services, opportunities for passive and limited active recreation, or general public enjoyment and respite. Open space may include water bodies such as lakes, ponds, rivers, and streams. Additionally, open space may be located in rural, suburban, or urban settings with no limitation on size, however large or small.

Relationship to Montgomery County's Comprehensive Plan

Montgomery County's comprehensive plan sets forth a vision to help guide overall growth and future development. The county's current comprehensive plan, last updated in 2021, *Montco 2040: A Shared Vision* (Montco 2040), lays out a vision organized around the following three themes: Connected Communities, Sustainable Places, and Vibrant Economy. Specifically, open space preservation helps to fulfill the following two goals in the plan:

- Connected Communities goal: *Expand and connect county trails, local trails, greenways, natural areas, and parks.*
- Sustainable Places goal: *Conserve natural resources, environmentally-sensitive areas, and farmland.*

While not explicitly covered in the comprehensive plan, protected open space also provides significant benefits towards creating a Vibrant Economy as soundly demonstrated in the 2022 county report, *Return on Environment: The Economic Impact of Protected Open Space in Montgomery County, Pennsylvania*.

It is noted that the county will be adopting a new comprehensive plan, *Montco 2050, A Comprehensive Plan for a Changing World*, in 2026. Please visit MCPC's website for the adoption status of the new comprehensive plan to assess how the plan addresses the topic of county open space preservation.

This grant program has been established to advance the county's comprehensive plan vision and goals by partnering with and supporting other entities seeking to protect open space.

Relationship to Municipal Open Space Plans and/or Comprehensive Plans

Municipalities wishing to utilize funds under this grant program are encouraged to have a current, adopted, stand-alone park and open space plan, or park and open space component in their comprehensive plan.

Use of Land

Land purchased with grant funds shall be used for open space purposes. Depending on the location, intent, and need of the proposed open space project, certain normal accessory site amenities/improvements will be permitted on a case-by-case basis, particularly when these amenities/improvements: 1) Possess historic value based on their inclusion (or potential for inclusion) on a historic registry, or 2) Support mental and physical respite, especially for historically underserved communities in more urbanized settings. If substantial structures exist on the property that do not fall into these two categories, the municipality or private organization will have to pay the full value for these structures as well as for their removal.

Open space purchased under this grant program shall not be used for activities such as municipal building sites, detention basins, public utilities (including cell towers, solar arrays, or wind farms), fire or police stations, public works or maintenance yards, or other similar uses. A description of future anticipated open space uses of the property shall be included in the grant application. Applicants should be aware that the *Declaration of Covenants, Conditions, and Restrictions*, established by the county as part of the grant agreement, may limit future use of the property to particular open space purposes.

Public Access

Some form of appropriate public access on open space properties acquired with county grant funds is required in most cases. The county recognizes that public access may take many forms ranging from trails to interpretive signage.

Open space that is successfully preserved through this program must be identified with signage acknowledging the county's grant program.

There may be some limited exceptions when the primary purpose for preservation is the protection of sensitive ecological features and where public access has the potential to harm these features. If a municipality or private organization is seeking to purchase land for open space where public access is proposed to be prohibited or limited, the exact nature and rationale for the public access prohibitions/limitations shall be described in the grant application. In determining the appropriateness of the public access limitations, the county must determine that a distinct public benefit can be identified which is greater than any private landowner benefits resulting from the preservation of an open space tract.

Price of Land

The grant amount must be equal to or less than the fair market value of the land as established by a complete and independent professional appraisal. The appraisal shall be completed within the 18-month period preceding the application date. It is recommended that a title search be conducted prior to, or as part of the appraisal process, to ensure that the appraisal reflects the appropriate rights being acquired. The title report must be shared with the appraiser. The applicant is encouraged to do everything possible to acquire the land at the lowest price. To this end, the applicant may wish to consider bargain sales, life estates, installment purchases, or other legal and financial mechanisms.

All grant requests must be accompanied by an appraisal estimate prepared by a Pennsylvania-certified general real estate appraiser for each property to be acquired. Appraisals must contain full narrative reports prepared in accordance with current professional standards and practices. The appraisal must conform to the most recently published version of *The Appraisal Foundation's Uniform Standards of Professional Appraisal Practice* (USPAP) inclusive of *Standard 3: Appraisal Review, Development* and *Standard 4: Appraisal Review, Reporting*. The report must be prepared in sufficient detail with full documentation to justify to the county the fair market value for a property or easement. The appraisal report must separate out the value of substantial improvements, including structures, from the land. The county reserves the right to perform an additional appraisal of the property or easement at its own expense. If the applicant intends to purchase a property for an amount in excess of the fair market value as determined by the appraisal or the county, the amount of the grant shall be determined as a portion of the fair market value and not the sale price.

Part 3. Grant Application Requirements and Criteria

A. GRANT LIMIT

$500,000 is the maximum grant amount.

B. PROJECT MATCH

The project match is the required commitment from the applicant to support the project.

1. The minimum project match must be at least 25% of the grant award (e.g., a $100,000 grant request will require a $25,000 match).
2. The match may include funds from any source. A letter of commitment from the funding source(s) for any of the required matching funds should be provided.
3. Please refer to the eligible and ineligible costs listed above in Part 2 to determine which project-related costs may go towards the required match.

C. PROJECT EVALUATION CRITERIA

The Project Narrative requirements (as detailed in Part 4 below) provide information on how the proposed project meets the following evaluation criteria. These criteria serve as a guiding framework for the grant application evaluation and recommendation.

- **Proposed Project and Means of Protection**
  The project as a whole and its proposed means of protection.
- **Land Characteristics**
  The property's ecological, recreational, cultural/historical, and/or scenic resources and features.
- **Proposed Use and Management**
  The proposed future uses and stewardship of the property.
- **Project Compatibility with County and Municipal Plans and Public Support**
  The project's relationship to county and municipal open space plans/strategies and the project's municipal and public support.
- **Applicant's Ability and Experience with Open Space Acquisitions**
  The applicant's ability to complete the project and their past experience with open space preservation.
- **Project Cost and Matching Funds**
  The cost of the project and the amount and source of matching funds.
- **Project Potential to Address Disparities in Access to Open Space**
  Whether the project has the potential to address disparities in access to outdoor recreation and open space.
- **Vulnerability of Land**
  Whether the land is currently at risk of development.

Part 4. Grant Application Process

A. APPLICATION REQUIREMENTS

Each application shall contain the following:

1. **Pre-Application Form**: The applicant must fill out a *Pre-Application Form* as soon as they determine their interest in seeking an open space grant. Submitting this *Pre-Application Form* early will alert county staff of the applicant's interest and provide them with the basic project information so they may provide feedback and guidance prior to the applicant's decision to submit a full application. A signed application letter along with the additional materials requested below will follow submittal of the *Pre-Application Form*. County staff will respond to the *Pre-Application Form* with any questions or feedback within ten (10) business days of receipt. The *Pre-Application Form* requests the following information:

Applicant and Contact Information:

- *Applicant (municipality or lead municipality in the case of a multi-municipal application; or nonprofit organization)*
- *Name of the head of the governing body for municipal applicants; or, president or chair for nonprofit organizations*
- *Mailing address for communication related to this project*
- *Name and title of primary contact person for this project*
- *Telephone number for primary contact person*
- *Email address for primary contact person*
- *Partners or third parties involved with this project (please include email addresses)*

Funding Request Information:

- *Project Name*
- *Project Location: In which municipality, or municipalities, is the project located?*
- *Street address or location of the project*
- *Tax Parcel Number(s)*
- *Brief description of the project (a few sentences)*
- *Estimated acquisition date*
- *Description of anticipated funding amounts and sources*
- *Has this project ever received funding from Montgomery County?*
    - *If yes, please describe the project that received county funding and the source of the funds.*
- *Has a related project ever received funding from Montgomery County?*
    - *If yes, please describe the project that received county funding and the source of the funds.*
- *For nonprofit applicants, has the applicant successfully preserved land in Montgomery County in the past?*
    - *If yes, please briefly describe the project(s) that was/were previously preserved.*

2. **Signed Application Letter:** For municipal applicants, the letter should be signed by the head of the governing body. For nonprofit organization applicants, the letter should be signed by the president or chair of the organization.

3. **Resolution of Authorization:** An official resolution authorizing the applicant to submit the application is required. For municipal applicants, a resolution of authorization for a grant application should be adopted at a duly advertised public meeting of the local governing body. For nonprofit applicants, a resolution of authorization for a grant application should be adopted at a board meeting of the organization. If there is a scheduling conflict that prohibits a resolution prior to the application submission, the applicant shall contact county staff to advise of the delay. Resolutions may be provided up to one (1) month after the application submission. Applications for multi-municipal projects shall include resolutions in support of the project from each municipality involved, and the application shall identify which municipality is the lead applicant.

4. **Project Narrative**:

i. Acquisition Project Description:

a. Briefly describe the project, including its means of protection. Is the land being preserved by a fee simple or conservation easement acquisition?
b. If a proposed fee simple acquisition, what entity will own the land? If a proposed conservation easement, what entity will hold the easement?
c. If a proposed conservation easement, is the easement holder capable of enforcing the easement's restrictions?

ii. Basic Property Information:

a. A brief description of the property including its size, current use(s), and zoning.

iii. **Land Characteristics:**
   a. Does the land contain ecological, recreation, education, cultural/historic, and/or scenic resources and features and provide ecosystem services?
   b. Would the land extend or connect to existing protected open space properties?

iv. **Proposed Use and Management:**
   a. What uses, activities, and amenities are proposed for the property?
   b. To what extent will the property be managed?
   c. Is the applicant capable of managing and stewarding the land proposed for acquisition? Describe the applicant's past experience in land stewardship.
   d. Would the public have access to the property, and if not, why?
   e. As an option, the applicant may choose to provide a conceptual plan if helpful for depicting future use and stewardship of the property. This is not a requirement.

v. **Project Compatibility with County and Municipal Plans and Public Support:**
   a. Is the property identified for protection in county and/or municipal open space plans or open space components of a comprehensive plan (or a duly adopted amendment to either document)? Specifically, does the property fall within a *Conservation Opportunity Area*, *Greenway Corridor*, *County Park Focus Area*, or *Rural Resource Area* per the current county comprehensive plan?
   b. Has the property been identified as part of a *Conservation Landscape* in the 2008 *Natural Areas Inventory Update*?
   c. Is the property part of an identified overall open space acquisition strategy the applicant is pursuing?
   d. Does the host municipality support the acquisition?
   e. Is there any multi-municipal cooperation involved?
   f. Has the public demonstrated support for the project?

vi. **Applicant's Ability and Experience with Open Space Acquisitions:**
   a. Does the applicant have an established structure, charter, legal standing, and dedicated officers capable of carrying forward their proposal?
   b. Has the applicant previously and successfully purchased land for open space preservation? Describe the applicant's past successful open space projects and their general ability to complete the project.
   c. What steps has the applicant taken towards the purchase of the open space?

vii. **Project Cost and Matching Funds:**
   a. What is the estimated cost as established in an appraisal report prepared by a professional appraiser?
   b. Is the price of the property comparable to other properties with similar attributes?
   c. Is the applicant using donation tax credits or other techniques to discount the purchase price of the proposed land acquisition?
   d. Is the applicant providing a match that meets or is larger than the minimum match required?
   e. Has the source of matching funds been identified?
   f. Are matching funds currently budgeted by the applicant?
   g. If no matching funds are available, what is the ability of the applicant to raise funds for the match?

viii. **Project Potential to Address Disparities in Access to Open Space:**
   a. Using the Delaware Valley Regional Planning Commission's Title VI Compliance Tool for the Greater Philadelphia Region, determine whether any indicators are "above average" for Ethnic Minority, Foreign-Born, Limited English Proficiency, Low Income, and/or People of Color, in any of the U.S. Census tracts in which the project is located? If so, in how many tracts and in which categories?
   b. Using the Trust for Public Land's *ParkServe* online mapping tool, determine whether the project is located in a "Priority Area for New Parks" and would address an existing lack of access to open space and/or parks.

c. Would the project help address disparities in access to open space and outdoor recreation in communities where open space and/or parks are lacking?

ix. Vulnerability of Land:

a. Is the land currently protected or preserved in any manner?
b. Have development proposals been made for the property proposed for preservation?

The Project Narrative shall be no more than six (6) pages in length (single spaced, 12-point type). All additional required materials listed below will not count against the six-page limit.

5. **Project Maps and Photos:** Provide map of the municipality showing the exact location of the proposed acquisition; a property or tax map showing the property size, configuration and relationship to abutting properties and a few representative photos of the subject property. Maps should depict adjacent or nearby existing protected open space as well as existing and proposed public access (e.g., trails, view corridors).

6. **Property Appraisal:** Provide a complete copy of the property appraisal used to establish fair market value.

7. **Agreement of Sale:** If available, provide the Agreement of Sale and include any side agreements or special considerations not described in the Agreement of Sale.

8. **Project Funding:** Provide information outlining anticipated funding sources and amounts, including the grant being requested from the county and the required 25% match. The information should generally follow this format:

[Insert Name of Open Space Acquisition Project]	
Total Fee/Easement Acquisition Cost	**$ -**
Montco Forever Green Grant Request Amount ($500,000 max.)	**$ -**
Minimum Match Required (25% of grant request)	**$ -**

Anticipated Sources of Matching Funds	
Municipal Funds (please list)*	*$ -*
Other Grants (please list)	*$ -*
Other Sources (please list)	*$ -*
Total	**$ -**
Percent of Match Requirement**	

* Including for Project-related Expenses

** Must be 100% or greater

B. TIMELINE

The steps for the grant application process are as follows:

1. Applications are accepted on a rolling basis.
2. Applicant submits Pre-Application Form. MCPC staff responds with any feedback and guidance within ten (10) business days of receipt.
3. In coordination with MCPC staff, the applicant provides a project introduction to the OSB at a duly advertised public meeting.
4. Applicant submits full application including all materials listed above under Application Requirements. These materials should be emailed to Bill Hartman, MCPC Trails & Open Space Planning Manager: bill.hartman@montgomerycountypa.gov

5. Applications are reviewed by MCPC staff for completeness. If additional information is required, the applicant will be contacted.
6. At a subsequent OSB meeting, the OSB provides its funding recommendation. It is noted that the OSB may take one of several different types of recommendation actions, including but not limited to: recommendation for approval of the submitted grant request, recommendation of a modified grant amount, deferral of a recommendation for consideration at a later date, or a denial to recommend. All actions taken by the OSB are advisory to the County Commissioners. In recommending approval of a grant, the OSB may add appropriate conditions that would need to be addressed as part of the open space project.
7. Applications recommended for approval by the OSB are presented to the County Commissioners for their consideration and action at a duly advertised public meeting. If approved, the County Commissioners will issue a resolution for the project approving allocation of funds for the project.
8. If approved by the County Commissioners:
    - A copy of the County Commissioners' resolution will be forwarded to the grantee for its records.
    - MCPC staff provides draft versions of the *Grant Agreement* and *Declaration of Covenants, Conditions and Restrictions* (an exhibit to the *Grant Agreement*) for the grantee's review. Boilerplate versions of a typical *Grant Agreement* and *Declaration of Covenants, Conditions and Restrictions* are available on the program webpage for reference.
    - In cases where eligible project-related expenses other than acquisition costs (e.g., appraisal, boundary survey) are being used to meet the required match, the grantee shall submit documentation of these costs to MCPC staff.
    - Grant funds will be provided to the grantee at or following settlement—as timing permits—either by wire or physical check.
9. Before or following settlement, the grantee will:
    - Execute the *Grant Agreement*, which will include an un-executed version of the *Declaration of Covenants, Conditions, and Restrictions*; the county will counter sign the *Grant Agreement*.
10. Following settlement, the grantee will:
    - Record the deed with the County Recorder of Deeds office.
    - Insert the required deed information into the draft *Declaration of Covenants, Conditions, and Restrictions*.
    - Execute and record the *Declaration of Covenants, Conditions, and Restrictions* with the County Recorder of Deeds office.
    - Provide a copy of the recorded deed and an executed original of *Declaration of Covenants, Conditions, and Restrictions* to MCPC staff; MCPC staff will attach the executed *Declaration of Covenants, Conditions, and Restrictions* to the county's final *Grant Agreement* as an exhibit.
    - Install at least one (1) sign on the project site acknowledging the use of county grant funds. The county will provide the sign(s) and general installation requirements.

Part 5. Administration for Approved Grants

A. TIMEFRAME FOR USING FUNDS

Land acquisition must be completed within one (1) year from the date of grant approval. In some cases, the land purchase may be delayed due to factors outside of the grantee's control. If the grantee is unable to complete the project within a one-year timeframe, up to two (2) one-year extensions may be granted subject to the OSB's recommendation if conditions warrant. If the grantee does not receive an extension or indicates to the county that they can no longer acquire the land for which the grant was offered, the grant will be terminated.

B. GRANT AGREEMENT

For all approved grant awards, and as discussed above, a grant agreement between the county and the grantee must be executed. This serves as a formal contract between the county and the grantee and includes terms and conditions for the funding. Exhibits to the grant agreement typically include, but are not limited to, the following:

- Agreement of Sale
- Montgomery County Open Space Board Resolution
- Montgomery County Board of Commissioners Resolution
- Project Description
- Project Location Map
- Property Appraisal Report
- Declaration of Covenants, Conditions, and Restrictions

C. GRANT DISBURSEMENT

Awarded grant funds will be provided directly to the grantee at settlement or paid as reimbursement to the grantee after the purchase of the open space property or conservation easement. The grantee must give the county adequate advance notice of the settlement date and any information required in preparation for the county's participation at settlement (if participation is necessary), including but not limited to title report(s), site inspection report, deeds, the fully executed grant agreement, and any agreements between the grantee and the landowner.

D. DOCUMENTATION REQUIREMENTS

A copy of the recorded deed(s) shall be submitted to county staff at the conclusion of all steps. A photo of the required signage installed on the project site shall be provided to county staff.



Stoneleigh: a natural garden, Villanova

MONTGOMERY
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To learn more about the program, visit:
https://www.montgomerycountypa.gov/4808/Montco-Forever-Green-Grant-Program

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