



Appalachian Landscapes Protection Fund

Stewardship and Conservation Easement Standards & Carbon Project Guidelines (July 2023)

Overview

Stewardship of projects that the Appalachian Landscape Protection Fund (ALPF) supports must be consistent with *maintaining or increasing ecosystem resilience to climate change and forest ecosystem carbon*. Further, all ALPF projects must meet the standards outlined below. Projects can meet these standards through a conservation easement (CE) and/or stewardship plan. Because there are multiple ways to design a conservation project and meet the same goals, OSI does not require particular CE or stewardship plan terms or language to meet the requirements of the Fund. Similarly, OSI neither requires nor prohibits enrollment in carbon offset projects but rather we provide guidance for projects that are or will be enrolled in a carbon project. OSI staff are available to discuss and review CE and stewardship plan language and share sample provisions.

Please note:

- *Prior to submitting a grant proposal, applicants should review the following standards and guidance.*
- *Grant proposals should describe how their project will meet these standards and goals.*
- *OSI staff will review and approve the final conservation easement, stewardship plan and/or carbon offset project¹ goals of approved projects prior to distribution of grant funds.*

Standards for Landowners and CE Holders

- Conservation landowners and CE holders should have as a primary mission the protection of biological diversity, forest ecosystem carbon, wildlife habitat, and/or other closely related conservation values.
- Conservation landowners should have a track record in land stewardship and sufficient resources to manage the land for these values.
- CE holders should have a track record in CE monitoring and enforcement, and sufficient funds and staff to monitor and enforce the CE.

¹ Forest carbon offset projects are defined as land management actions that sequester and store atmospheric greenhouse gases and are developed to generate carbon credits within a carbon offset market.

Stewardship Standards

Every ALPF project should meet the stewardship standards detailed below:

- Have as primary purposes maintaining ecosystem resilience to climate change and maintaining and/or increasing forest ecosystem carbon;
- Give priority to maintenance of forests exhibiting old growth characteristics and to protection of “hub” or “mother” trees;
- Recognize the need to accommodate adaptation to shifts in species composition;
- Prohibit development and forest conversion to tree plantations or agriculture;
- Prohibit logging and road building on steep slopes (generally greater than 15 degrees) and in high altitude forests;
- Prohibit surface mining, except for limited removal of gravel or sand to be used on the protected property and prohibit (surface and subsurface) hydrocarbon and mineral extraction to the maximum extent possible. *However, if your project has outstanding mineral rights through severance or leases that you cannot extinguish, contact the appropriate OSI field coordinator prior to submitting an application to discuss the project’s eligibility;*
- Seek coordination with and input on stewardship from organizations and peoples that have long-term connections and knowledge of the land or project area;
- Address ecosystem resilience by
 - Defining “climate resilience” with language similar to the following – “the ability of an area to adjust and adapt to climate change while maintaining species diversity and ecological function,”
 - Identifying and minimizing impacts to sensitive or under-protected geology or habitat types such as floodplains, stream buffers and limestone areas;
 - Enhancing connectivity through road closures where appropriate, reforestation, and removal of invasive species and by minimizing road building and other structures and activities that may inhibit wildlife movement, and
 - Minimizing intensive recreational uses (ATVs and RV camping, for example) that can destroy micro-climates, impede wildlife movement, and alter the site’s hydrology;
- Address forest ecosystem carbon by
 - Defining forest ecosystem carbon to include above and below ground carbon stocks, including soil carbon,
 - Prescribing actions that will maintain or increase above and below ground carbon storage,
 - Maintaining or enhancing native forests with diverse structure and composition, protecting forest soils and mature stands, and minimizing forest fragmentation, and
 - Addressing the risk of forest carbon loss from invasive species, insects, disease, wildfire, and other disturbances.

Additional Standards for Conservation Easements

In addition, conservation easements should also meet the following standards:

- Recitals section should describe the property's value for carbon storage and sequestration, conserving aquatic and/or terrestrial biological resources and sustaining climate resilience including the presence of any unique geology types and the land's role in providing microclimates and ensuring local and regional connectivity for wildlife;
- Restrictions and Reserved Rights sections should establish enforceable and clear standards for permanent protection of the land's ecosystem resilience characteristics and forest ecosystem carbon²;
- Forestry must be governed by a management plan that specifies how forest management will be conducted to meet the CE's purposes and ALPF Stewardship and CE Standards, that is regularly updated, and that is approved by the CE holder;
- Include effective and practical monitoring and enforcement provisions;
- Include a process for regular, productive communication between the easement holder and landowner; and,
- Contain a Baseline Documentation Report that includes, along with the standard sections, description of the project's forest carbon attributes and climate resilience characteristics³.

Guidance for Carbon Offset Programs:

OSI grantees (and landowners they are working with) may choose to enroll their conservation project in a carbon offset project, while also permanently protecting their land. While OSI allows for grantees to enroll projects in the carbon market, all projects must meet the standards set forth above at the time of closing. As a general rule, stewardship standards of the fee or easement protection supported by the grant should by themselves should increase or at least maintain forest carbon with no net loss.

OSI's [Forest Carbon Resource Guide](#) provides helpful information on carbon programs and stewardship to protect and increase forest carbon. The Land Trust Alliance has provided extensive guidance on blending conservation easements and carbon programs in [Carbon Offsets in Conservation Easements: The Essentials for Land Trusts](#)⁴. We strongly suggest consulting the Alliance's document and/or a carbon offset developer to discuss your project.

² This provision may limit the ability to enroll in a carbon offset project in the future, particularly those with durations less than 99 years. Note that this provision for ecosystem carbon can be omitted if the carbon will be imminently protected through a 99+ year verified carbon project.

³ OSI can provide broad scale carbon data if needed.

⁴ Land Trust Alliance charges non-members for this publication. OSI will cover the cost of this document if needed.