



# NHCP-LTCF GUIDELINES (2022-2023)

## Large Grants

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## INTRODUCTION TO THE NHCP-LTCF PROGRAM

The Government of Canada is investing \$100 million over four years in the Natural Heritage Conservation Program (from April 1, 2019, to March 31, 2023) as part of Budget 2018's Nature Legacy Initiative.

As an outcome of this investment, the Nature Conservancy of Canada (NCC) in partnership with Wildlife Habitat Canada launched the Natural Heritage Conservation Program – Land Trusts Conservation Fund (NHCP-LTCF). Eligible recipients are invited to apply to this federally-funded program which aims to assist and support the securement of key conservation areas across Canada, protect habitat for species at risk, enhance connections and corridors and stem the loss of biodiversity. Up to \$4.5 million per year, over the next four years will be made available to support eligible projects under the NHCP-LTCF program. The program is currently scheduled to conclude on March 31, 2023.

The NHCP-LTCF is sorted into two categories of funding, one for Large Grant asks (\$30,001 - \$1 million) and the other for Small Grant asks (\$5,000 up to \$30,000). This **Guidelines Large Grants – 2022-2023** document speaks to the Large Grants category of NHCP-LTCF only. *For further information on the Small Grants category of the NHCP-LTCF 2022-2023, please see Guidelines Small Grants – 2022-2023 (launch anticipated in Spring 2022).*

### **Important notes for Year 4 (Large Grants):**

- Required minimum matching funds ratio of 1.5: 1;
- Associated project expenses that occurred between April 1, 2019 and March 31, 2023 [4 fiscal year period] may be applied to the project as matching funds;
- Mid-project milestone dates: July 29, 2022 for appraisal; October 3, 2022 for signed APS/donation agreements.

### **Anticipated Program Funding Years:**

<del>Program year 1 (2019 / 2020)</del>	<i>COMPLETE.</i>
<del>Program year 2 (2020 / 2021)</del>	<i>COMPLETE.</i>
<del>Program year 3 (2021 / 2022)</del>	<i>IN PROGRESS.</i>
Program year 4 (2022 / 2023)	<i>In the final year of the scheduled program, the goal is to secure at least 2,500 hectares to exceed the overall program deliverable of 10,000 hectares secured by community and regional land trusts under the LTCF.</i>

To learn more about achievements under the program, please visit [WHC's website](#).

### WILDLIFE HABITAT CANADA CONTACT INFORMATION

**Name:** Sonia Blanchard  
**Title:** Project Manager, LTCF  
**Email:** [sblanchard@whc.org](mailto:sblanchard@whc.org)

## IMPORTANT BACKGROUND INFORMATION – CANADA TARGET 1

In 2015, in order to meet its international commitments to the conservation of biodiversity, federal, provincial and territorial governments developed 19 biodiversity targets for Canada. The first target, Target 1 stated that “By 2020, at least 17% of terrestrial areas and inland water, and 10% of marine areas, are conserved through networks of Protected Areas and other effective area-based conservation measures.” Canada has since embraced two ambitious and closely related goals: Conserve 25% of our lands and waters by 2025, and 30% by 2030.

The NHCP-LTCF program is designed to directly support Canada Target 1 and as such, **land funded under the NHCP-LTCF program must count towards Target 1 objectives** for permanent or long-term protection of land, either as a “Protected Area” (PA) or an “Other Effective area-based Conservation Measure” (OECM), as defined by Appendix 1 of [One with Nature 2019](#):

**Protected Area (PA):** A Protected Area is “a clearly defined geographical space, recognized, dedicated and managed, through legal or other effective means, to achieve the long-term conservation of nature with associated ecosystem services and cultural values.” (*One with Nature definition, 2019*).

**Other Effective area-based Conservation Measure (OECM)\*:** An OECM is broadly defined as “a geographically defined area other than a Protected Area, which is governed and managed in ways that achieve positive and sustained long-term outcomes for the in-situ conservation of biodiversity, with associated ecosystem functions and services and where applicable, cultural, spiritual, socio-economic, and other locally relevant values.” (*One with Nature definition, 2019*).

*\*If your project involves a unique mechanism for conservation or an OECM, please contact WHC to discuss the details of your project before submitting an application.*

*Note: successful applications with projects involving a unique mechanism for conservation or an OECM will require approval by ECCC before a Funding Agreement between NCC and the Applicant can be signed (WHC and NCC will facilitate the ECCC request for approval).*

A Decision Support Tool exists to provide support in assessing whether or not an area contributes to Canada Target 1. Applicants are encouraged to review the [Decision Support Tool](#) and assess their project land using the [Decision Support Tool Screening Template for Protected Areas and OECMs](#) to determine whether the area can be counted towards Canada Target 1.

For further information, an overview of the [Accounting for Protected and Other Conserved Areas](#) can be found on the Pathway to Canada Target 1 website.

## HOW TO APPLY

It is the responsibility of the Applicant to ensure that they have read, acknowledge and understand the requirements of the NHCP-LTCF Large Grants program.

Application Forms must be completed and submitted online. In order to be considered, completed Application Forms and required documentation are to be submitted between **February 21, 2022** and **March 21, 2022 at 8:00pm (ET)**. Please see section [B-2](#) for further details on the application process and how Application Forms will be reviewed.

To apply for funding under the NHCP-LTCF Large Grants program, [please follow the link](#).

Only one project may be proposed on each Application Form. A land trust may submit up to 3 project proposals, which would require the submission of 3 separate Application Forms, each of which must be uploaded with the required set of documents. Please see section [A-3](#) Project Eligibility for complete details.

**Note:**

- If the project's closing date changes at any time, Applicants must notify WHC immediately.
- If an Applicant fails to upload the correct, requested documentation in the acceptable format with their Application Form submission, the application may be deemed incomplete and disqualified from funding consideration.
- Each submitted application is considered as a stand-alone application. Applicants submitting more than one application must ensure that each individual application form includes all of the required documentation requested. WHC will not consider any documents shared via another application form (e.g., The Board resolution or attestation confirming adoption or compliance with *Canadian Land Trust Standards and Practices 2019* and/or *Guide des bonnes pratiques en intendance privée: aspects juridiques et organisationnels* must be uploaded for each application).
- In cases where multiple eligible organizations are working in partnership to complete a project, **WHC will only communicate with the Applicant land trust on project and application related matters**. Should the partner organization wish to be contacted or included on project and application correspondence, an appropriate contact must be named in the application itself, as a secondary contact. **Please review section [A-3: Closing Solely in the Name of a Different Organization](#) carefully.**

### ***Capacity Building Services:***

The Ontario Land Trust Alliance, the Land Trust Alliance of British Columbia and the Réseau de milieux naturels protégés are working collectively to provide capacity building services to support land trusts in successfully engaging with the Land Trusts Conservation Fund (LTCF) by:

- assisting land trusts in adherence to the [Canadian Land Trust Standards and Practices 2019](#) and/or [Guide des bonnes pratiques en intendance privée: aspects juridiques et organisationnels](#); and,
- providing technical support to land trusts with regards to LTCF priorities such as Conservation Planning, Pathway to Target 1, Record Keeping, and Land Management.

***Please note that WHC is the primary contact for all general program inquiries regarding program eligibility and guidelines.***

If capacity building service/support is of interest to you and you have not already done so, we encourage you to contact your regional representative directly:

- [Morgan Roblin](#), Conservation Manager – [Ontario Land Trust Alliance](#) (supporting land trusts in Ontario and Atlantic Canada - English speaking)
- [Marilou Bourdages](#), Executive Director – [Réseau de milieux naturels protégés](#) (supporting land trusts in Québec and Atlantic Canada - French speaking)
- [Paul McNair](#), Executive Director – the [Land Trust Alliance of British Columbia](#) (supporting land trusts in British Columbia, Alberta, Manitoba and Saskatchewan)

## **FUNDING**

As noted above under INTRODUCTION, NCC has partnered with WHC in the provision of the NHCP-LTCF Large Grants and Small Grants programs. While WHC is providing grant administration services for the Land Trusts Conservation Fund, NCC is the sign off authority on all funds and funding agreements for successful projects under the NHCP-LTCF.

WHC and NCC reserve the right to award partial funding to eligible land trusts.

**Please also note that:**

- NHCP-LTCF funds may be combined with other Canadian federal funds on the same project, as long as funds go towards unique expenditures;
- other Canadian federal funds (this includes any COVID-19 federal subsidies, such as the Canadian Emergency Wage Subsidy, etc.) cannot be used as matching funds for NHCP-LTCF funds; and,
- **hectares secured must count towards the expected results of the NHCP-LTCF only;** hectares secured cannot be counted towards the expected results of multiple Canadian federal funding programs.

Select eligible projects that are not initially approved for funds will be placed on a “waiting list,” and the Applicant will be notified.

In the event that NHCP-LTCF funds are returned to the Program, the Funding Agreement will be nullified and WHC will begin the process of re-allocating the returned funds to eligible projects on the “waiting list” before the end of the program year. Applicants with projects included on the “waiting list” will be contacted if funds become available for their project.

## **SECTION A – NHCP-LTCF PROGRAM ELIGIBILITY AND REQUIREMENTS**

### ***A-1: Program Year 4 Deadlines***

- a) **Application Form Deadline:** Application Forms will be accepted between **February 21, 2022** and **March 21, 2022 at 8:00 pm (ET)** for projects with a closing date between April 1, 2022 and December 15, 2022.

**Important Note:** If NHCP-LTCF funds are required to close your project, your closing date must be **July 13, 2022 or later**, in order to allow for adequate administrative processing time, collection of required documentation and release of funds from NCC.

- b) **Project Finalization Deadline:** The deadline for finalizing WHC project deliverables and submitting all final documentation to receive the final installment is **February 2, 2023 at 8:00 pm (ET)**. **Receipt of final deliverables/documents by WHC after this deadline may result in Applicants forfeiting the final installment.**

### ***A-2: Land Trust Eligibility***

To be eligible to apply to the NHCP-LTCF Large Grants Program, Applicants must meet all the criteria below:

- i) Applicants must be a Canadian land trust; \*  
\* *A Canadian Land Trust is defined as a not-for-profit conservation organization that, as all or part of its mission, actively works to conserve land by acquiring land or Conservation Agreements (or assisting with their acquisition) and/or stewarding/managing land or Conservation Agreements. (CLT Standards & Practices 2019).*
- ii) Applicants must be a [registered Canadian charity](#); and
- iii) Applicants must be in compliance or working towards substantial compliance with the [Canadian Land Trust Standards and Practices 2019](#) or *Guide des bonnes pratiques en intendance privée: aspects juridiques et organisationnels*, as demonstrated through a Board resolution or confirmed

through an attestation by a senior officer of the organization. This includes, in particular, compliance or substantial compliance with Standards 8-12 which address the securement and stewarding of conservation lands.

*\*\*The Canadian Land Trust Standards & Practices were revised in January 2019 and land trusts will be in a transition phase while adopting new practices. Land trusts are expected to be making significant progress towards the adoption of a Board resolution. Resolutions are expected to be filed with the appropriate Alliance, if applicable, and on-file with the land trust for review by WHC, upon request.*

### **A-3: Project Eligibility**

#### **a) Project Eligibility Overview**

Applicants are permitted to submit one project per Application Form with a funding ask between \$30,001 and \$1,000,000. **Applicants may choose to submit up to 3 large project Application Forms (projects) for a total ask of \$1,000,000** (this would require three separate Application Forms be submitted, one per proposed project), **or a single project for \$1,000,000, per program year.**

#### **b) Project Definition**

A project is defined as a parcel or grouping of parcels that may or may not share the same landowner (see multiple ownership below):

- sharing the same conservation objectives (see below);
- clearly contributing to [Canada Target 1](#) (i.e., can be counted as [Protected Areas](#) or [Other Effective Area-based Conservation Measures](#)); and,
- consisting of either conservation agreements or fee simple acquisition or a combination thereof.

**Shared and mutually beneficial conservation objectives** may include:

- Where parcels occur in a cluster, connectivity / continuity of protected lands, providing increased ecosystem integrity and risk mitigation for climate change or as key wildlife corridors;
- Where parcels are more geographically dispersed, intact habitat for a particular species-at-risk or protection of rare ecosystem types, priority habitats or protection of key stopover points on migratory pathways.

#### **Important Notes:**

- Eligible projects must have a closing date between April 1, 2022 and December 15, 2022.
- Land trusts are expected to commit to protecting the number of hectares presented in the application, regardless of the number of landowners or parcels.

#### **c) Multiple Ownership**

It is important to note that consideration of multiple ownership under the NHCP-LTCF program exists to support land trusts in cases where securing lands with multiple ownership is required for the viability of the project.

A project may share up to 2 individual landowners. Any proposed project with more than 2 individual landowners will be considered on a case-by-case basis, and must provide a clear rationale as to why multiple ownership is essential to the successful completion of the project. Only projects that have demonstrated sufficient rationale will be eligible, and will be subject to an additional risk assessment by WHC. The additional assessment will include consideration of the likelihood of securing all parcels, if applicable, within the proposed timeline with available resources.

**Please Note:** Projects with more than 2 landowners that are approved for funding under the NHCP-LTCF may be required to provide additional interim reporting and status updates upon request from WHC.

**d) Minimum Amount of NHCP-LTCF Funds Available per Project:**

Applicants may request a minimum of \$30,001 in NHCP-LTCF funds per project, therefore, per Application.

**e) Maximum Amount of NHCP-LTCF Funds Available per Project:**

Applicants may request up to a maximum of \$1,000,000 in NHCP-LTCF funds per program year. Applicants may submit:

- up to 3 Application Forms (projects) for a total ask of \$1,000,000; or,
- a single Application Form (project) for \$1,000,000.

**f) Acquisition Project Type:**

The acquisition of fee simple lands or [Conservation Agreements](#) are eligible project types under the NHCP-LTCF.

**NOTE:** Land funded under the NHCP-LTCF program must count towards Target 1 objectives for **permanent or long-term protection of land**.

**g) Transaction Type (including Ecogifts):**

Purchases, donations and [split receipts](#) are all eligible transaction types under the NHCP-LTCF.

**h) Mortgages and Other Encumbrances:**

*Fee Simple Land:* Land secured by the land trust in fee simple may not be mortgaged, charged, or otherwise financially encumbered (take-back mortgages are also not permitted under the NHCP-LTCF Program). All remaining financial encumbrances (mortgages, liens, etc.) must be discharged prior to, or at the time of title transfer. Other existing non-financial encumbrances (e.g., utility rights of way, hypothèque agreements with a public or para-public foundation) may be permitted with the consent of WHC.

*Conservation Agreements:* Any financial encumbrances registered on the land for which the Conservation Agreement (CA) will be registered against must be discharged or postponed in favour of the CA. Other remaining non-financial encumbrances (e.g., utility rights of way) may be permitted with the consent of WHC.

**Note:** Financial encumbrances are not acceptable, as remedies for the encumbrance holder normally include taking control of the property ownership, sale of the land to satisfy the debt and potential loss of the land trust interest in the land.

**i) Conservation Plan:**

Only priority projects determined through documented conservation planning process are eligible under the NHCP-LTCF. Projects must be in a Key Conservation Area (KCA), which means that the project falls under an existing Conservation Plan that identifies the land/project area as a priority for conservation. The Applicant will be required to:

- provide the specific address and boundaries of the property, for WHC's verification (map check); and,
- identify how the project land is identified as a priority under the applicable Conservation Plan.

Key Conservation Areas include areas identified under:

- a. An **NCC Natural Area Conservation Plan (NACP)**. Applicants who wish to adopt an NCC NACP should contact NCC to ensure their project falls within the boundaries of an NCC NACP.
- b. DUC's target landscapes as articulated by the habitat joint ventures of the [North American Waterfowl Management Plan](#).
- c. Priority Places and other Federal, Provincial or Territorial government plans (copy to be provided to WHC with application submission).



- d. **Other science-based plans developed by land trusts** (copy to be provided to WHC with application submission).

If the project does not fall within a KCA, please call WHC before proceeding with an application. In situations where a proposed project property does not fall within a KCA, the Applicant will be required to provide:

- A sufficient case for conservation (a [Conservation Planning Framework](#) guidance tool is available for use), which defends how the project property:
  - i. meets the Canada Target 1 criteria;
  - ii. links to conservation initiatives;
  - iii. identifies the presence of critical habitat for species at risk, etc.; and,
- A sufficient rationale that demonstrates the prioritization of the property/project land from a conservation planning standpoint and the significance of the project.

**j) Joint Title Holders:**

Applicants are permitted to close projects in joint title ownership with other organizations, provided that all title holders meet the eligibility criteria listed:

- are a registered Canadian charity that is in compliance or substantially in compliance with the *Canadian Land Trust Standards and Practices or Guide des bonnes pratiques en intendance privée: aspects juridiques et organisationnels*; or,
- are government departments or government agencies, including a municipality or public body performing a function of the government of Canada, carrying out similar work in Canada; or,
- are an Indigenous entity capable of holding title to land, including a corporation controlled by an Indigenous entity, carrying out similar work in Canada.

**Note:**

- The receiving entity of LTCF funds to complete the securement must be the Applicant land trust.
- Agreements must be made out between the **Applicant land trust and the landowner**. Transfer of agreement rights from one organization to the Applicant land trust **is not permitted under the LTCF program**.

**k) Dispositions After Closing:**

Awardees must receive approval from ECCC, through NCC, for any transfer, sale, disposition or encumbrance of land, or any portion thereof, under the program. All dispositions must comply with the terms of the *NHCP-LTCF Funding Agreement* and also be to a receiving entity that meets the following criteria:

- are a registered Canadian charity that is in compliance or substantially in compliance with the Canadian Land Trust Standards and Practices or *Guide des bonnes pratiques en intendance privée: aspects juridiques et organisationnels*; or,
- are government departments or government agencies, including a municipality or public body performing a function of the government of Canada, carrying out similar work in Canada; or,
- are an Indigenous entity capable of holding title to land, including a corporation controlled by an Indigenous entity, carrying out similar work in Canada.

The Awardee shall make the transfer of land or interest in land conditional upon the receiving entity providing a commitment to the Awardee to conserve the land in perpetuity in adherence to the *NHCP-LTCF Funding Agreement* and in adherence to Canada Target 1.

**l) Closing Solely in the Name of a Different Organization:**

Applicants are not permitted to close the property solely in the name of a third party. Applicants must be the final recipient of NHCP-LTCF funds and must be at least partially on title at the time of closing, except in the case of a project in partnership with American Friends of Canadian Conservation or American Friends of Canadian Nature as outlined below.

**m) American Friends of Canadian Conservation (AFCC) or American Friends of Canadian Nature (AFCN):**

The use of American Friends of Canadian Conservation (AFCC) or American Friends of Canadian Nature (AFCN) are an allowable mechanism to help land trusts acquire lands from American donors.

Application Forms must be submitted by the land trust, not AFCC or AFCN.

It is the full responsibility of the Applicant to understand and adhere to the rules and requirements involved in land acquisition with American donors.

**n) Required Matching Funds for Each Project:**

The NHCP-LTCF is a matching funds program, with a required match ratio of a **minimum 1.5:1**. This means that for every \$1 of Program funds awarded, a minimum of \$1.50 in matching funds from sources other than Canadian federal government investments must also be contributed.

Matching funds may include both cash and in-kind contributions.

**Note:**

- Applications with a matching funds ratio that is higher than 1.5:1 may be considered more favourably.
- Associated project expenses that occurred between April 1, 2019 and March 31, 2023 (4 fiscal year period) can be applied to the project as **matching funds** (provided that the expenses were not paid for with other sources of Canadian federal funds).

**IMPORTANT:** For first installment, Awardees will be required to submit an attestation signed by a senior officer confirming the total match value of the project, that all matching funds are in place and that no other sources of Canadian federal government funds have been used as Cash match or In-Kind matching funds.

**In-kind match** refers to the cash-equivalent funding in the form of a donation (donated land or donated services) for which no cash is exchanged but is essential to the project and that would have to be purchased on the open market, or through negotiation with the provider, if it were not provided.

**Note:** Awardees planning to include in-kind matching funds under the NHCP-LTCF **must submit evidence of the value of all donated goods/services** (e.g., a legal invoice should clearly outline the exact amount credited to the invoice for the purposes of donating the legal service).

- This documentation must be submitted by the October 3, 2022 mid-project milestone, or 30 days prior to close (whichever occurs first). Awardees must maintain records of value for all donated goods/services, which will be part of the financial project audit.

If using the donated value of land as in-kind match, the amount of in-kind match should be the difference between the appraised value and the purchase price. For example: if a property is appraised at \$100,000, but the landowner has agreed to a lower purchase price of \$90,000, the difference between

\$100,000 and \$90,000 (= \$10,000) is the amount that should be included in the project budget as in-kind match. If a project is a 100% donation, the entire appraised value would count as in-kind match.

As part of the NHCP-LTCF reporting requirements, all **volunteer involvement** is to be reported to WHC. A Volunteer Reporting Section will be provided as part of the Final Reporting process for awarded projects.

*The definition of a volunteer is as a person who works for an organization without being paid, a person who voluntarily offers themselves for a service or undertaking, or a person who performs a service willingly and without pay.*

**Note:** Full-time or part-time staff **cannot donate** their time to a project as in-kind match; however, staff time can be applied as cash match in cases where this cost is covered by other non NHCP-LTCF funds.

**o) Stewardship Endowment Fund Policy**

Organizations are required to have an established stewardship endowment fund policy at the time of application to the NHCP-LTCF. The policy must outline how the Applicant land trust manages endowment funds for the stewardship of project lands, into perpetuity. This policy must demonstrate alignment with program requirements, see section A-3p) Stewardship Endowment Accounting.

**p) Stewardship Endowment Fund Accounting:**

Projects funded under the NHCP-LTCF require a cash contribution to a stewardship endowment fund for the long-term stewardship of the lands.

The stewardship endowment contribution must be accounted for separately (meaning the stewardship funds **cannot be pooled with general operations funding** and the earnings must be used to fund long-term stewardship of the property); however, stewardship endowment funds are allowed to be pooled in an internally restricted general endowment fund.

Funds from Canadian federal government sources cannot be used for stewardship endowment under the NHCP-LTCF. Projects must raise funds for the stewardship endowment from other sources, and funds for the stewardship endowment must be made in addition to existing operating revenue and/or existing endowment funds; **pre-existing funds in an endowment cannot be re-assigned/extended** to cover the NHCP-LTCF stewardship endowment fund requirement.

**q) Calculation of NHCP-LTCF Required Stewardship Endowment Contribution**

Given that a complete financial project audit is required under the Large Grants program, the Awardee’s external financial auditor will be required to verify and sign off on the fact that the correct amount of Stewardship Endowment Funds were transferred into the land trust’s endowment account and sourced appropriately; therefore, **the provision of the completed financial project audit with Final Reporting, is required as proof of fulfilling the Stewardship Endowment Fund requirements under this program.**

The amount of stewardship endowment required under the NHCP-LTCF is determined by using the table below:

<b><i>Value of Land or CA</i></b>	<b><i>Stewardship Endowment Contribution Required</i></b>
<i>Less than \$50,000</i>	<i>Minimum of \$5,000</i>
<i>&gt;\$50,000</i>	<i>Note that a minimum of \$5,000 is required, regardless of which option is used to determine stewardship endowment contribution.</i>  <i>There are 2 approaches to choose from:</i>

	<ol style="list-style-type: none"> <li>1) use the <a href="#">Stewardship Calculator</a> based on the land trust's estimate of the actual stewardship costs associated with a particular property.</li> <li>2) apply a flat rate of 10% of the fee simple land value or Conservation Agreement value up to a maximum cap of \$400,000.</li> </ol>
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**r) Environment and Climate Change Canada (ECCC) Recognition and Communications Protocol:**

Awardees will, from time to time, undertake communications activities and outreach that will highlight and promote achievements under the Program. These communication activities must be conducted in compliance with the following Public Acknowledgement and Official Languages requirements:

- If the communication is for wide distribution or for a wide scale activity (i.e., national or provincial), then it must be made available in both official languages. This includes press releases, project materials (handouts, newsletters, reports, etc.), advertisements and event invitations.
- If the communication is for local distribution only, then unilingual English or French is acceptable, except where inclusion of official language minority communities is appropriate (Awardees should refer to requirements in their signed Funding Agreement). If the inclusion of official language minority communities is appropriate, reasonable effort in both official languages is required for all communications.

Communications Activities and Requirements:

- **Digital Promotion / Social Media:** ECCC may repost social media messages concerning NHCP-LTCF projects that were originally posted on the Awardee's social media platforms. The Awardee will reciprocate, as appropriate, for ECCC social media messages regarding the NHCP-LTCF.
- **Event Planning:** The Awardee will provide WHC with three-months advanced notice of anticipated Project announcement/event dates. Please note that event dates should not be set prior to receiving ECCC approval. As required, WHC will work with the Awardee and NCC will work with ECCC to confirm any government representation at events and acquire needed ECCC approval. A detailed event plan is required. Please use the event plan template provided by WHC.
- **Media Relations / News / Press Release:** The Awardee will provide any draft news releases to WHC at least six weeks before the proposed announcement date for review by WHC, NCC and ECCC Communications. As required, WHC will work with the Awardee and NCC will work with ECCC to acquire needed ECCC approval. Please use the news release template provided by WHC. News releases pertaining to the Program will include NHCP boilerplate text and a Ministerial quote (if provided by ECCC) in order to promote the Government of Canada's funding. The Awardee will ensure that news releases intended for general audiences are distributed in both official languages.
- **Signage:** The Awardee is required to design, manufacture and install property-based signage for partner recognition on NHCP-LTCF projects acquired through fee-simple purchase.

*Note: The signage requirement does not apply to Projects conserved through Conservation Agreements (easements, servitudes or covenants).*

The cost to design, manufacture and install property-based signage for partner recognition is an eligible expense under the program. A template sign is available and is recommended for use. The sign template will be provided to the Awardee upon award notification.

- Before signage is manufactured, the design will need to be approved by WHC, NCC and ECCC. Please allow at least one week (from time of final draft submission to ECCC) for approval.
- Property-based Program recognition signage will include the Government of Canada logo.

From time to time, project lands may be exempt from signage due to local concerns or inaccessibility (e.g. identification of species at risk habitat). Exemptions must be requested by the Applicant and approved by WHC and NCC.

- **Property Photos:** The Awardee will be required to provide at least one high quality image of the Project property(ies), for possible use in ECCC social media and other promotional materials. The Awardee will be required to provide authorization to WHC/NCC/ECCC for the use of the image(s). *In cases of an anticipated confidentiality/privacy conflict with this requirement, please contact WHC.*

#### ***A-4: Expense Eligibility***

NHCP-LTCF funds can only be used to fund in-year expenditures associated with the securement of fee simple land or Conservation Agreements. [Chart 1 - Eligibility of Expenses under the NHCP-LTCF Program](#) outlines eligible expenses and eligible matching funds.

**Eligible project expenses** will be those that have been **incurred in the 2022-2023 fiscal year** (April 1, 2022 to March 31, 2023).

NHCP-LTCF funds cannot be used to cover rebatable/refundable taxes.

*Charging Staff Time:* Staff time AND/OR consultant time that is directly related to the project are eligible expenses, including all Staff time necessary for planning, negotiating, coordinating, managing and completing the project.

**Note:** Up to 15% of the total value of the project (total project budget), to a maximum of \$50,000, can be requested in NHCP-LTCF funds for Salaries and Wages.

As per normal business practice, Awardees are expected to keep appropriate records, invoices and supporting documentation of all expenditures under the NHCP-LTCF program in anticipation of the financial project audit. Awardees are also expected to keep records and supporting documentation pertaining to staff time expensed under the NHCP-LTCF program.

## **Chart 1 – Expense Eligibility under the NHCP-LTCF - Large Grants**

Please note that this chart includes all high-level categories of eligible expenses. Some examples have been provided to help land trusts identify eligible expenses under listed categories. Please note that bulleted examples are not an exhaustive list.

- **Eligible expenses** are those directly related to the project that have been incurred between April 1, 2022 to March 31, 2023.
- NHCP-LTCF funds cannot be used to cover rebatable/refundable taxes.
- Associated project expenses that occurred between April 1, 2019 and March 31, 2023 (4 fiscal year period) may be applied to the project as **matching funds** (provided that the expenses were not paid for with other sources of Canadian federal funds).

<b>Expenditures</b>	<b>Is the expense eligible to receive NHCP-LTCF program funds?</b>	<b>Is the expense eligible to include as Matching Funds (Cash)?</b>	<b>Is the expense eligible to include as Matching Funds (<u>In-Kind</u>)?</b>
<b>Purchase Price / Cost of Land or Conservation Agreement</b>	✓	✓	X
<b>Donated value of Land or Conservation Agreement</b>	N/A	N/A	✓
<b>Stewardship Endowment Fund</b>	X	✓	X
<b>Fundraising Costs</b>	X	✓	✓
<b>Travel</b> – travel expenditures that are necessary to the successful completion of the project. To be eligible, travel must take place by the least expensive means, and rates may not exceed the maximum allowances permitted by the <a href="#">National Joint Council Directive</a> : <ul style="list-style-type: none"> <li>• <a href="#">Kilometric rates</a> (only applicable to personal-vehicle travel away from the office, not for daily commuting)</li> <li>• <a href="#">Accommodation and meal allowances</a></li> <li>• Air travel for trips fewer than nine consecutive hours are reimbursed at the economy rate.</li> <li>• The standard accommodation is a basic room, in a safe environment and conveniently located. The Applicant should always seek the most reasonable rate.</li> </ul>	✓	✓	✓
<b>Salaries and wages</b> - including all existing benefits for employees and contract staff, and mandatory employment-related expenditures. <ul style="list-style-type: none"> <li>• Includes all Staff time necessary for planning, negotiating, managing, coordinating and completing the project.</li> </ul> <p><b>Note:</b> up to 15% of the total value of the project (total project budget), to a maximum of \$50,000, can be requested in NHCP-LTCF funds for Salaries and Wages.</p>	✓	✓	✓
<b>Contractors</b> - costs associated with contractors engaged to undertake the project activities, such as general labourers, or researchers.	✓	✓	✓
<b>Materials and supplies expenditures</b> <ul style="list-style-type: none"> <li>• Includes utilities, phone, internet, etc.</li> </ul>	✓	✓	✓
<b>Equipment rentals</b>	✓	✓	✓

<b>Vehicle rental, lease and operation expenditures</b>	✓	✓	✓
<b>Lease of office space</b> – the portion of the cost to lease office space that may be requested in LTCF funds is calculated as 5% of the organization’s occupancy cost, as reported on line 4850 of the most recent T4033 - CRA Registered Charity Information Return, <b>to a maximum of \$3,000.</b>	✓	✓	✓
<b>Communication and printing, production, and distribution expenditures:</b> <ul style="list-style-type: none"> <li>• <i>Design and installation of property-based program recognition sign(s).</i></li> <li>• <i>Property-based communication costs or alternative project-specific funding recognition and communication or event expenses.</i></li> </ul> <b>Note:</b> a maximum of \$5,000 may be requested in LTCF funds under this category (including printing, production, distribution expenditures).	✓	✓	✓
<b>Management and professional service expenditures</b> - costs associated with management and professional services required to support a project, such as: <ul style="list-style-type: none"> <li>• <i>Accounting charges</i></li> <li>• <i>Monitoring and translation (internal) charges</i></li> <li>• <i>Official languages translation charges</i></li> <li>• <i>Legal fees/charges, title search fees, registration fees, and severance/subdivision fees required to secure the project.</i></li> <li>• <i>Securement-related consultant costs necessary to negotiate the project, or in the case of Conservation Agreements, drafting or Baseline Documentation Report (BDR) and the Conservation Agreement.</i></li> </ul>	✓	✓	✓
<b>Costs associated with eligible land planning, Land Securement and stewardship initiatives and Projects such as, land costs, appraisals, surveys, baseline documentation, land transfer tax.</b> Includes: <ul style="list-style-type: none"> <li>• <i>Appraisal Costs</i></li> <li>• <i>Survey Costs (if applicable)</i></li> <li>• <i>Real Estate Broker Fees</i></li> <li>• <i>Environmental Assessments (if applicable)</i></li> <li>• <i>Stewardship Implementation Actions, which includes: i) conducting biological inventories to inform the development of the property management plans; ii) property management plan writing and review; iii) implementing property management actions on fee simple lands; iv) conservation agreement compliance monitoring on easements, servitudes and covenants; under the condition that the expense is incurred between April 1 and March 31 of the associated NHCP-LTCF program year.</i></li> </ul> <b>Note:</b> a maximum of \$10,000 can be requested in NHCP-LTCF funds for the development of management plans that are associated / required as part of permanent protection.	✓	✓	✓
<b>Land Transfer Tax (LTT) and Sales Tax (excluding rebatable portion)</b>	✓	✓	X
<b>Property Tax (only when paid as part of closing)</b>	✓	✓	X

<b>Cost of Independent Financial Project Audit – <u>should NOT be included in project budget</u></b> <i>Note: the audit cost will be paid for outside of awarded NHCP-LTCF funds, and therefore the audit cost should not be included in your NHCP-LTCF funding request. Please see the section on <a href="#">Project Audit</a> for full details.</i>	X	X	X



## ***A-5: Additional Requirements and Expectations under the NHCP-LTCF Large Grants Program***

If successful Applicants choose to accept NHCP-LTCF funds, the following describes the expectations and requirements under the NHCP-LTCF Large Grants program:

### **a) NHCP-LTCF Funding Agreement:**

Applicants must be prepared to sign a legal agreement (the "[NHCP-LTCF Funding Agreement](#)") with the Nature Conservancy of Canada (NCC).

#### **Important Note:**

Applicants must review the [NHCP-LTCF Funding Agreement](#) template **before submitting an Application Form**, as the terms of the agreement as presented in the template are not open for negotiation, with the only exception being minor modification.

### **b) Baseline Documentation Reports (BDRs) for Conservation Agreement Only:**

All Conservation Agreements require a [Baseline Documentation Report \(BDR\)](#) be developed and signed by the landowner. Where possible, BDRs should be prepared prior to closing and signed by the landowner and land trust at, or prior to, closing. The BDR must also be registered on title, **in accordance with Provincial mechanisms**. Confirmation that the BDR has been completed, and registered on title (in accordance with Provincial mechanisms), is required with Final Reporting.

**Exception:** In the event that seasonal conditions prevent the completion of a full BDR report by closing, the landowner and the land trust must sign a schedule for finalizing the full report and an acknowledgement of interim data at closing (CLTSP [Standard 11.B.](#)). In this case, a completed BDR, registered on title (in accordance with Provincial mechanisms), is required **no later than 6 months post-closing**, and confirmation must be provided to WHC.

**Important Note:** As it is an eligibility requirement under the NHCP-LTCF for land trusts to be in compliance, or working towards substantial compliance with the Canadian Land Trust Standards and Practices (2019), or with the *Guide des bonnes pratiques en intendance privée: aspects juridiques et organisationnels*, it is strongly encouraged that land trusts work diligently and expeditiously to become compliant with the BDR requirements therein. It is expected that Canadian land trusts will be making significant progress in working towards, or achieving, compliance.

### **c) Project Audit:**

Applicants must have a financial audit completed on the [project](#) by an external Chartered Professional Accountant (CPA). The financial audit statements must demonstrate the following (please see the [audit example](#) provided on the WHC website):

- a minimum 1.5:1 match ratio;
- a list of all eligible expenditures by expense category; and,
- a breakdown of expenses applied to the NHCP-LTCF funds vs. those covered by matching funds (cash vs. in-kind).

#### Audit cost and payment:

**Note:** the cost of the audit will be covered **outside of awarded NHCP-LTCF funds**, and therefore the audit cost should not be included in your NHCP-LTCF funding ask.

Awardees must provide a realistic project audit estimate to WHC within one-month of funding approval. Common audit pricing on land acquisition projects is normally in the range of \$500 to \$6,000; however, only the amount noted on the third-party audit invoice will be paid. For audit costs above \$6,000.00, WHC and NCC may, at their discretion, cap the amount provided.

WHC will pay for the cost of the audit, in accordance with the following:

- The auditor must bill WHC directly for the costs associated with the financial project audit;
- A copy of the audit must be received by WHC no later than **February 2, 2023 8:00pm (ET)**;

- Payment of the audit invoice will be made by WHC, following WHC’s receipt and approval of the project’s financial audit.

Final installment will be issued by NCC, following WHC’s and NCC’s receipt and approval of all final reporting documentation.

**d) Appraisals:**

The submission of an appraisal that has been completed by a designated appraiser (i.e., AACI) within the last year is a requirement of the NHCP-LTCF. If the land trust has an appraisal that was completed more than a year ago, the land trust must provide confirmation and/or sufficient explanation to demonstrate that the market has not changed since the appraisal was completed. Applicants are encouraged to review the [Canadian Land Trust Standards and Practices \(2019\)](#) section on appraisals.

**Note:**

- Appraisals must be completed based on vacant land value only, no land “improvement” value of any kind (e.g., home, barn, road, shed, etc.) is to be included in the Fair Market Value (FMV) valuation of the project land.
- For Conservation Agreement/Easement projects, the FMV of the Conservation Agreement/Easement must be identified in the appraisal.

**At application**, if a full appraisal has yet to be completed, then an assessment of the value of the project land(s) with clear rationale explaining how the value was determined will be required. Acceptable documents include a short form appraisal, a letter from your appraiser outlining how the value was determined, or a strong rationale and demonstration of market value prepared by the Applicant.

**A full appraisal will be required at the mid-project milestone deadline, July 29, 2022**, or sooner as completed, and must be submitted no later than 30 days prior to close.

NHCP-LTCF funds can only be used to fund a purchase price no greater than 5% above the appraised value of the property, as determined by the appraisal. For example, for a property appraised at \$100,000, a maximum of \$105,000 of NHCP-LTCF funds can be used towards the purchase price. **Applications in which the land trust intends to pay more than the appraised value will be closely evaluated to ensure that there is a strong value-for-money proposition.**

**Note:**

- **To be an eligible expense**, the cost for an appraisal must have been incurred after April 1, 2022 (within the current fiscal year).
- A full appraisal needs to be submitted prior to the release of any awarded funds.
- The fair market value of the land indicated on the appraisal/assessed value should be reflected in the “Total Expense Amount” column for the Purchase/Sale Price line of the Project Budget.
  - If the anticipated purchase price of the land is lower than the appraised value/assessed value, the difference should be included in the column “Matching Funds (In-Kind)”.
  - If the purchase price is higher than the appraised value, a clear explanation should be included in the submitted Project Budget.

## **SECTION B – APPLICATION AND AWARD PROCEDURES**

### ***B-1: Application Form Requirements***

**a) How many Application Forms can I submit?**

Applicants are only permitted to submit one project per Application Form, **but may submit up to three Large Grant project Application Forms (projects) for a total ask of \$1,000,000 OR a single project for \$1,000,000** in year 4. Therefore, up to 3 Large Grant Application Forms may be submitted by a land trust in year 4.

b) **How many projects can be submitted in a single Application Form?**

Each Application Form represents one project.

c) **How do I submit the Application Form?**

Application Forms must be completed and submitted [online](#). Applicants will be prompted first to create a username and login password, and the Application Form itself can be saved at any point in time during the completion of the form. If an Applicant has applied to previous program years of the NHCP-LTCF Program, the same username and password can be used to complete the Application Form.

**Note:** Any Application Forms submitted to WHC staff by email or mail will not be considered.

All reporting documentation can be uploaded to the application account throughout the duration of the project.

d) **What documentation will be required as part of a complete Application Form?**

The list of documentation required in the Application Form is listed under [Chart 2: Checklist of Required Documentation for Application and Installments – Large Grants](#).

e) **How do I know if my Application Form was successfully submitted online to WHC?**

Applicants will receive an automated email when the Application Form has been submitted successfully.

## ***B-2: Evaluation of the Application Form***

a) **How and when will my Application Form be reviewed?**

Application Forms will be screened by WHC against eligibility criteria within 1-2 weeks following the submission. If the Application Form does not meet eligibility requirements or is incomplete, WHC reserves the right to reject the application and the Applicant will receive a rejection letter.

**Note:** It is the Applicant's responsibility to ensure the submission of a complete Application Form, including all of the correct, requested documentation in an acceptable format.

b) **Who will evaluate my Application Form?**

Eligible applications are evaluated by an External Review Panel. The External Review Panel evaluates Application Forms and provides the results for WHC's consideration. WHC then presents applications recommended for funding to NCC for final funding decision.

c) **How will my Application Form be evaluated?**

Eligible applications will be evaluated on the relative strengths of the conservation criteria. If the Application Form does not convey competitive conservation value, WHC reserves the right to reject the project. For the complete evaluation and breakdown, please refer to the [NHCP-LTCF Evaluation Table 2022-2023](#).

**Note:** WHC will consider the likelihood of securing all parcels within the proposed timeline, with available resources, particularly where a project has more than 2 landowners.

## ***B-3: Award/Rejection Letters***

a) **When can I expect to receive an award/rejection letter?**

It is anticipated that award/rejection letters will be distributed in mid to late May 2022.

**Important Note:** If NHCP-LTCF funds are **required to close your project, your closing date must be July 13, 2022 or later**, in order to allow for adequate administrative processing time, collection of required documentation and release of funds.

b) **How can I expect to receive an award/rejection letter?**

Award/rejection letters will be distributed via email.

## ***B-4: First and Final Installments***

a) **How are the amounts of both installments determined?**

Payments are made to awarded recipients in two separate installments. The First installment amount is calculated using a holdback amount for the second/Final installment amount.

For example, an Applicant is awarded \$250,000 of NHCP-LTCF funds:

*First installment* = \$212,500 (\$250,000 less a 15% holdback of \$37,500)

*Final installment* = \$37,500 (15% of \$250,000)

b) **What documents are required before NCC will release first and/or final installment?**

See [Chart 2 - Checklist of Required Documentation for Application and Installments – Large Grants](#). After all required and requested documentation has been completed and approved by WHC and NCC, payment will be processed for disbursement.

**Note:** NCC requires at least 4 weeks to process and release payment installments.

Awardees will be required to complete an Interim Reporting form at July 29, 2022, to provide WHC with a status update on the project.

Failure to submit all necessary/requested documentation for final reporting by the deadline, may result in the forfeit of the final installment.

c) **When will NCC release first and final installment?**

**IMPORTANT:**

- **Invoices must be made out to the Nature Conservancy of Canada** (NOT WHC), and submitted to WHC for processing.

**First installment:** All correct, required documentation, listed in [Chart 2 - Checklist of Required Documentation for Application and Installments-Large Grants](#), must be submitted to WHC to receive the first installment (for disbursement by NCC).

**Final installment:** All correct, required documentation, listed in the [Chart 2 - Checklist of Required Documentation for Application and Installments-Large Grants](#), must be submitted to WHC by **February 2, 2023 8:00 PM (ET)** to receive the final installment (for disbursement by NCC).

d) **How will NCC release the first and final installment in year 4?**

NCC will electronically transfer funds for both the first and final installments.

The **first installment** will be transferred no earlier than 5 business days prior to the closing date, either to the lawyer or authorized legal representative, to be held in trust; OR directly to the land trust, if requested.

The **final installment** will be transferred directly to the land trust following receipt and approval of Final Reporting documentation by WHC and NCC.

**Chart 2 - Checklist of Required Documentation for Application and Installments – Large Grants**

**CAUTION:**

- If an Applicant fails to submit a complete Application Form or fails to upload the correct, requested documentation in an acceptable format with their Application Form submission, the application may be deemed incomplete and disqualified from funding consideration.
- If the Awardee fails to submit all required correct documentation by the Mid-Project Milestone deadlines, the Awardee may be required to forfeit funding and return any NHCP-LTCF funds to NCC, immediately.
- If the Awardee fails to submit all required documentation by the Final Reporting deadline (February 2, 2023), final installment will not be released.

Documentation to be submitted with Application Form; for Mid-Project Milestones; and for first and final installment.	Required with Application Form	Required at Mid-Project Milestone	Required for First Installment / minimum 30 days prior to close	Required with Final Reporting and Final Installment
1) <a href="#">Parcel Grid</a> with legal land descriptions (to include either Property Identification Numbers or Roll Numbers), and a map of the project land(s) clearly illustrating the boundaries of the property(ies).	✓			
2) Spatial Data – provided in one of the two following options: <ul style="list-style-type: none"> <li>• <u>Option 1</u>): GIS spatial data containing the boundaries and names for each parcel included in the property. Acceptable formats: ESRI file geodatabases, full suite of shapefiles (dbf., shp., prj., sbn., sbx., shx., cpg), or KMLs; <b>OR</b></li> <li>• <u>Option 2</u>): A table or spreadsheet with the UTM Northing and Easting coordinates and corresponding name for all parcel vertices of the property, UTM zone and datum. Acceptable formats: excel spreadsheets or cvs files.</li> </ul>	✓			
3) Conservation Plan - If the project falls within: <ul style="list-style-type: none"> <li>• a NACP or NAWMP target landscape: the name of the plan and the specific address and boundaries of the property must be provided;</li> <li>• priority places and other Federal, Provincial or Territorial government plans: a link to or a copy of the plan must be provided;</li> <li>• other science-based plans: a copy of, or a link to, the plan must be provided.</li> </ul> <p><u>In situations where a proposed project property does not fall within an identified plan</u>: call WHC before proceeding with an application. A case for conservation (conservation rationale) must be provided.</p>	✓			

<p>4) <a href="#">Project Budget</a> – NHCP-LTCF template (Year 4) must be used. <i>Invoices must be addressed to NCC and submitted to WHC for processing.</i></p>	<p>✓ Project Budget</p>		<p>✓ Project Budget and Invoice <i>(minimum 30 days prior to closing date)</i></p>	<p>✓ Financial Report and Invoice</p>
<p>5) A Board resolution and/or attestation from a senior officer confirming <u>both</u>:</p> <ul style="list-style-type: none"> <li>the organization’s status with regard to compliance/working towards substantial compliance with CLTSP or <i>Guide des bonnes pratiques en intendance privée: aspects juridiques et organisationnels</i>; and,</li> <li>that the organization has an established stewardship endowment fund policy.</li> </ul>	<p>✓</p>			
<p>6) A copy of the appraisal:</p> <ul style="list-style-type: none"> <li>If a full or draft appraisal is not available at time of application submission, then one of the following must be submitted: short form appraisal, a letter from your appraiser outlining how the value was determined, or a rationale and demonstration of market value prepared by the Applicant.</li> <li>A full appraisal* must be provided to WHC no later than July 29, 2022, or sooner as completed, and must be submitted no later than 30 days prior to close. <i>*A full appraisal meeting the requirements in section <a href="#">A-5: d</a> is required for release of the First Installment.</i></li> </ul>	<p>✓ Assessed Value with rationale; draft appraisal OR full appraisal, if complete</p>	<p>✓ Full Appraisal <i>(no later than July 29, 2022)</i></p>	<p>✓</p>	
<p>7) Fully signed <a href="#">NCC Funding Agreement</a>; <i>Note: First Installment will not be released until the NCC Funding Agreement is fully signed.</i></p>		<p>✓ <i>(ASAP once received)</i></p>	<p>✓</p>	
<p>8) <b>Fee simple only:</b></p>				
<ul style="list-style-type: none"> <li>Purchase and Sale Agreement / Option to Purchase / Donation Agreement or Intent to Donate <ul style="list-style-type: none"> <li>If a signed Purchase and Sale Agreement (APS) or other agreement is not available at time of application submission, a <b>signed</b> non-binding letter of intent identifying the landowner’s interest in proceeding with the project is required;</li> </ul> </li> <li>A signed APS / Option to Purchase / Signed Donation Agreement must be provided to WHC no later than October 3, 2022, or sooner as completed, and must be submitted no later than 30 days prior to close.</li> <li>A copy of a preliminary title report/title search from legal counsel which acknowledges the Fee Simple land is free and clear of financial encumbrances;</li> <li>A copy of the post-closing title report (transfer deed) or land title demonstrating ownership.</li> </ul>	<p>✓ Signed non-binding letter of intent  <u>OR</u> Signed APS / Option to Purchase / Signed Donation Agreement / Intent to Donate</p>	<p>✓ Signed APS / Option to Purchase / Signed Donation Agreement  <i>(no later than October 3, 2022)</i></p>	<p>✓ Copy of a preliminary title report/title search  <u>AND</u> Signed APS / Option to Purchase / Donation Agreement <i>(must be submitted at minimum of 30 days prior to close)</i></p>	<p>✓ Transfer deed/land title</p>

<p><b>All Fee Simple properties:</b> a copy (pdf, jpg, etc.) of the design of the property-based recognition sign. See <a href="#">Environment and Climate Change Canada (ECCC) Recognition and Communications Protocol</a> for required approval process.</p>				✓
<p>9) <b>Conservation Agreement only:</b></p>				
<ul style="list-style-type: none"> <li>• Signed Conservation Agreement or Easement / Agreement of Purchase and Sale. <ul style="list-style-type: none"> <li>- If a signed Conservation Agreement/Easement or APS is not available at time of application submission, a <b>signed</b> non-binding letter of intent identifying the landowner’s interest in proceeding with the project is required;</li> </ul> </li> <li>• An unsigned copy of the Conservation Agreement/Easement must be provided to WHC no later than 30 days prior to close, alongside a letter signed by the landowner that a) records the value of the Conservation Agreement/Easement as identified by the appraisal, and b) confirms the landowner’s commitment to proceeding with the Conservation Agreement/Easement based on that value. <ul style="list-style-type: none"> <li>- <i>In cases of a 100% cash purchase or split receipt transaction, the letter must also include the amount being provided to the landowner in cash (split receipt transactions must also include the amount of the charitable receipt).</i></li> <li>- <i>In the case of an APS, a signed copy must be provided to WHC no later than October 3, 2022, or sooner as completed, and must be submitted no later than 30 days prior to close.</i></li> </ul> </li> <li>• A copy of a preliminary title report/title search from legal counsel which acknowledges the Conservation Agreement is free and clear of financial encumbrances, or evidence that the lender has agreed to postpone their financial interest in favour of the Conservation Agreement and to have this postponement registered on title with the Conservation Agreement;</li> <li>• A signed copy of the Conservation Agreement/easement and a copy of the post-closing title report (transfer deed) or registration that clearly shows the land trust as the new, registered owner.</li> </ul>	<p>✓</p> <p>Signed non-binding letter of intent <u>OR</u> Signed Conservation Agreement/Easement <u>OR</u> Signed APS</p>	<p>✓</p> <p>If applicable - Signed APS  <i>(no later than October 3, 2022)</i></p>	<p>✓</p> <p>Copy of a preliminary title report/title search)  <u>AND</u>  -Unsigned or signed Conservation Agreement/Easement, including a letter signed by the landowner (as outlined under “Documentation”)  Note: If the project includes an APS, the signed APS must also be submitted.  <i>(must be submitted at minimum of 30 days prior to close)</i></p>	<p>✓</p> <p>Signed CA/Easement and proof of registration</p>

<p><b>All Conservation Agreements</b>, a copy of the full <a href="#">Baseline Documentation Report (BDR)</a>.</p> <p><i>Exception: In the event that seasonal conditions prevent the completion of a full BDR report by closing, the landowner and the land trust must sign a schedule for finalizing the full report and an <u>acknowledgement of interim data at closing – to be submitted to WHC</u>. In this case, a completed BDR, registered on title (in accordance with Provincial mechanisms), is required <u>no later than 6 months post-closing, and confirmation must be provided to WHC</u>.</i></p>				✓
<p>10) An attestation signed by a senior officer confirming that all matching funds (excluding land value) are in place, and no other sources of Canadian federal government funds have been included as match.</p>		✓ <i>(no later than October 3, 2022)</i>	✓ <i>(minimum 30 days prior to close)</i>	
<p>11) An undertaking from the lawyer/notary to hold the NHCP-LTCF funds in trust, <u>if applicable</u> as the selected option for receiving funds.</p>			✓ <i>(minimum 30 days prior to close)</i>	
<p>12) A complete financial project audit package and audit invoice (auditor to invoice WHC directly); and, if applicable, evidence of value for in-kind goods/services.</p>				✓
<p>13) A copy of the Statement of Adjustments (if applicable).</p>				✓
<p>14) At least one high quality image of the Project property(ies),* for possible use in ECCC social media and other promotional materials, with authorization to WHC/NCC/ECCC for the use of the image(s). <i>*In cases of a confidentiality/privacy conflict with this requirement, please contact WHC.</i></p>				✓



## **GLOSSARY**

**Award/Rejection Letter:** Refers to the letter sent by WHC to the Applicant, advising whether or not the Applicant's Application has been approved to receive federal funds under the NHCP-LTCF, or if it has been rejected. If the Applicant has been approved, the letter will inform the Applicant of the maximum amount of federal funds awarded, as well as the necessary documents required (next steps) in order to receive first installment.

**Baseline Documentation Report (BDR):** For every Conservation Agreement, the land trust has a Baseline Documentation Report (that includes a baseline map and photographs) prepared prior to, or at, closing, is signed by the landowner and registered on title (in accordance with Provincial mechanisms). Both the landowner and the land trust should hold at least one original copy. The report documents the important conservation values protected by the Conservation Agreement and the relevant conditions of the property as necessary to monitor and enforce the Conservation Agreement. In the event that seasonal conditions prevent the completion of a full baseline document report by closing, the BDR may include an interim BDR and an acknowledgement that it will be replaced by a full report.<sup>1</sup>

See full BDR requirements under section [A-5 b\) Baseline Documentation Reports \(BDRs\) for Conservation Agreement](#).

**Canadian Land Trust:** A Canadian “not-for-profit conservation organization that, as all or part of its mission, actively works to conserve land by acquiring land or Conservation Agreements (or assisting with their acquisition) and/or stewarding/managing land or Conservation Agreements<sup>2</sup>.”

**Conservation Agreement:** Also referred to as a Conservation Easement, Conservation Servitude, or Conservation Covenant, means a legal document in which a landowner agrees to restrictions on activities that would threaten the environmental value of the land. The Conservation Agreement allows the landowner to remain on the land while ensuring its protection from future development. The owner can keep that land in the family, sell it or donate it whenever he/she chooses, subject to the terms of the Conservation Agreement continuing to remain in full force and effect.

**Conservation Planning Framework:** Refers to a planning framework that can be used by an Applicant to define priority areas for acquisition and long-term stewardship. Please see the Conservation Planning Framework Template and section [A-3 f\) Conservation Plan](#) for more information.

**Final Recipient:** Means a legal entity to which the NCC shall further distribute funds received under this Agreement in the manner provided in [section A-3](#). Eligible Final Recipients under the NHCP-LTCF are registered Canadian Charity Land Trusts who are in compliance or substantially in compliance with the Canadian Land Trust Standards and Practices 2019 or with the *Guide des bonnes pratiques en intendance privée: aspects juridiques et organisationnels*.

**Key Conservation Areas:** Key Conservation Areas means ECCC proposed Priority Places as well as other areas identified at the national, regional, provincial or local level through science-based conservation planning, which may be updated periodically.

**External Review Panel (ERP):** The ERP is comprised of 3 to 6 advisors from across Canada who have strong knowledge or experience in matters of land conservation and/or grant making in conservation. They will be responsible for reviewing the qualitative attributes of each application that WHC has deemed to have met all eligibility requirements. The ERP will evaluate projects using an [objective internal matrix](#). WHC reviews the ERP evaluations and then presents its recommendations to NCC for funding. NCC ultimately makes the final decisions regarding awards.

**Other Conserved Area or Other Effective area-based Conservation Measure (OECM):** is a geographically defined area other than a Protected Area, which is governed and managed in ways that achieve positive and sustained long-term outcomes for the in situ conservation of biodiversity, with associated ecosystem functions and services and

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<sup>1</sup> *Canadian Land Trust Standards and Practices (2019)*, pg. 20.

<sup>2</sup> *Canadian Land Trust Standards and Practices (2019)*, pg. 26.

where applicable, cultural, spiritual, socio-economic, and other locally relevant values” (*One With Nature definition, 2019*).

**Project:** For the full project definition under the NHCP-LTCF, see section [A-3: Project Eligibility](#).

**Protected Area:** is “a clearly defined geographical space, recognized, dedicated and managed, through legal or other effective means, to achieve the long-term conservation of nature with associated ecosystem services and cultural values” (*One With Nature definition, 2019*).

**Split Receipts:** The structure of a transaction which includes both cash payment for the purchase of land and also donation of land. Organizations and land trusts should be familiar with the CRA’s guidelines for split receipting and how it relates to property transactions, including Ecological Gifts. If necessary, the land trust / organization should obtain outside experience to assist them with any split receipting transactions.<sup>3</sup>

**Stewardship Endowment Fund:** Is an internally or externally restricted fund invested to provide a permanent source of revenue for land stewardship. See sections [A-3o](#)) and [A-3p](#)) for stewardship endowment requirements.

**Volunteer:** A volunteer is a person who works for an organization without being paid, a person who voluntarily offers themselves for a service or undertaking, or a person who performs a service willingly and without pay.

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<sup>3</sup> *Canadian Land Trust Standards and Practices (2019), Standard 9.*