



## NHCP-LTCF GUIDELINES (2023-2024) Small Grants

<b>INTRODUCTION TO THE NHCP-LTCF PROGRAM .....</b>	<b>3</b>
<b>IMPORTANT BACKGROUND INFORMATION.....</b>	<b>4</b>
<b>HOW TO APPLY .....</b>	<b>4</b>
CAPACITY BUILDING SERVICES .....	5
<b>FUNDING .....</b>	<b>5</b>
<b>SECTION A – NHCP-LTCF SMALL GRANT ELIGIBILITY &amp; REQUIREMENTS .....</b>	<b>6</b>
A-1: PROGRAM YEAR DEADLINES .....	6
A-2: LAND TRUST ELIGIBILITY.....	6
A-3: PROJECT ELIGIBILITY .....	7
a) <i>Project Eligibility Overview</i> .....	7
b) <i>Project Definition</i> .....	7
c) <i>Multiple Ownership</i> .....	8
d) <i>Minimum Amount of NHCP-LTCF Funds Available per Project</i> .....	8
e) <i>Maximum Amount of NHCP-LTCF Funds Available per Project</i> .....	8
f) <i>Acquisition Project Type</i> .....	8
g) <i>Transaction Type (including Ecogifts)</i> .....	8
h) <i>Mortgages and Other Encumbrances</i> .....	9
i) <i>Conservation Plan</i> .....	9
j) <i>Joint Title Holders</i> .....	9
k) <i>Dispositions After Closing</i> .....	10
l) <i>Closing Solely in the Name of a Different Organization</i> .....	11
m) <i>American Friends of Canadian Conservation (AFCC) or American Friends of Canadian Nature (AFCN)</i> ...11	11
n) <i>Required Matching Funds for Each Project</i> :.....	11
o) <i>Multiple Sources of Federal Funding</i> .....	12
p) <i>Stewardship Endowment Fund Policy</i> .....	13
q) <i>Stewardship Endowment Fund Accounting</i> .....	13
r) <i>Calculation of NHCP-LTCF Required Stewardship Endowment Contribution</i> .....	13
s) <i>Environment and Climate Change Canada (ECCC) Recognition and Communications Protocol</i> .....	14
A-4: EXPENSE ELIGIBILITY.....	15
<i>Chart 1 – Expense Eligibility under the NHCP-LTCF - Small Grants</i> .....	16
A-5: ADDITIONAL REQUIREMENTS AND EXPECTATIONS UNDER THE NHCP-LTCF SMALL GRANTS PROGRAM .....	19
a) <i>NHCP-LTCF Funding Agreement</i> .....	19
b) <i>Baseline Documentation Reports (BDRs) for Conservation Agreement Only</i> .....	19
c) <i>Project Financial Check</i> .....	19
d) <i>Project Audit</i> .....	20
e) <i>Appraisals</i> : .....	20
<b>SECTION B – APPLICATION AND AWARD PROCEDURES .....</b>	<b>21</b>
B-1: APPLICATION FORM REQUIREMENTS .....	21
a) <i>How many Application Forms can I submit?</i> .....	21
b) <i>How many projects can be submitted in a single Application Form?</i> .....	21
c) <i>How do I submit the Application Form?</i> .....	21
d) <i>What documentation will be required as part of a complete Application Form?</i> .....	22
e) <i>How do I know if my Application Form was successfully submitted online to WHC?</i> .....	22
B-2: REVIEW OF THE APPLICATION FORM .....	22

a) When will my Application Form be reviewed?.....	22
b) Who will review my Application Form?.....	22
c) How will my Application Form be reviewed?.....	22
B-3: AWARD/REJECTION LETTERS.....	22
a) When can I expect to receive an award/rejection letter?.....	22
b) How can I expect to receive an award/rejection letter?.....	22
B-4: FIRST AND FINAL INSTALLMENTS.....	23
a) How are the amounts of both installments determined?.....	23
b) What documents are required before WHC will release first and/or final installment? .....	23
c) When will WHC release first and final installment? .....	23
d) How will WHC release the first and final installment in year 5?.....	23
Chart 2 – Checklist of Required Documentation for Application and Installments - Small Grants.....	24
<b>GLOSSARY.....</b>	<b>29</b>

## INTRODUCTION TO THE NHCP-LTCF PROGRAM

The Government of Canada is investing a further \$90 million to their initial \$100 million investment (2019-2023), over the next 3 years in the Natural Heritage Conservation Program (from April 1, 2023, to March 31, 2026) as a continuation of the Budget 2018's Nature Legacy initiative. This funding will be shared by conservation partners including the Nature Conservancy of Canada, Ducks Unlimited Canada, and Canada's community and regional land trusts.

As an outcome of this investment, Wildlife Habitat Canada (WHC) in consultation with the Alliance of Canadian Land Trusts (ACLT) has launched the Natural Heritage Conservation Program – Land Trusts Conservation Fund (NHCP-LTCF 2023-2026). 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 \$5.08 million per year, over the next three years will be made available to support eligible projects under the NHCP-LTCF program. The program is currently scheduled to conclude on March 31, 2026.

The NHCP – LTCF 2023-2026 is sorted into different streams of funding, Large Grants, Small Grants and Quick Grants (pilot). For further information on the Small or Quick Grants funding streams, please visit the [WHC website and refer to the appropriate guidelines](#).

*Please note that the **Guidelines (2023-2024) – Small Grants**, defines program guidelines for Year 5 only and are subject to change for subsequent years.*

**It is anticipated that up to \$500,000.00** will be available to be disbursed to eligible Land Trusts with approved projects under the Small Grants category in the 2023-2024 program year.

### **Important notes for Year 5 (Small Grants):**

- Required minimum matching funds ratio of **1.5:1**
- **NEW\*** Associated project expenses that incurred between **April 1<sup>st</sup>, 2022 and March 31<sup>st</sup>, 2024** may be applied to the project **as matching funds**.
- Mid-project milestone dates:
  - **September 1<sup>st</sup>, 2023** (see [Chart 2](#) for what is required)
  - **November 1<sup>st</sup>, 2023** (see [Chart 2](#) for what is required)
  - **NEW\* January 15<sup>th</sup>, 2024** (see [Chart 2](#) for what is required)
  - **DEADLINE TO CLOSE: February 15<sup>th</sup>, 2024**
  - **FINAL REPORTING DEADLINE: March 31<sup>st</sup>, 2024**

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

<del>Program Year 1 (2019-2020)</del>	<del>COMPLETE.</del>
<del>Program Year 2 (2020-2021)</del>	<del>COMPLETE.</del>
<del>Program Year 3 (2021-2022)</del>	<del>COMPLETE.</del>
<del>Program Year 4 (2021-2023)</del>	<del>COMPLETE.</del>
Program Year 5 (2023-2024)	<i>The goal is to secure 5,000 hectares to exceed the overall program deliverable of 15,000 hectares secured by community and regional land trusts under the NHCP-LTCF by March 31, 2026.</i>

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

## WILDILFE HABITAT CANADA CONTACT INFORMATION

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## IMPORTANT BACKGROUND INFORMATION

The NHCP-LTCF program is designed to directly support Canada’s land conservation targets and as such, **land funded under the NHCP-LTCF program must count towards 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 WHC and the Applicant can be signed (WHC 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’s Target. 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’s Target.

For further information, see the overview of the Accounting for Protected and Other Conserved Areas.

## HOW TO APPLY

It is the responsibility of the Applicant to ensure that they have read, acknowledged, and understand the requirements of the NHCP-LTCF Small 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 **June 19<sup>th</sup>, 2023 at 1:00pm (ET)** and **September 1<sup>st</sup>, 2023 at 8:00pm (ET) or until all funds are allocated**. Application forms will be reviewed on a first-come, first-served basis until all funds are allocated; applications must meet eligibility requirements in order to be considered. Please see [Section A-3: Project Eligibility](#) for complete details.

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

Only one project may be proposed on each Application Form. A land trust may submit a maximum of two Small Grants project applications with funding asks between \$5,000.00 and \$50,000.00 each for immediate consideration.

Additional project proposals beyond the maximum of two may be submitted, but will be placed on a waiting list. Please see [Section A-3: Project Eligibility](#) and [B-1: Application Form Requirements](#) for complete details.

**Note:**

- **NEW\*** Projects with higher hectares may be considered more favorably.
- Projects with higher match ratios may be considered more favorably.
- 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.
- 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, the Réseau de milieux naturels protégés and the Alliance of Canadian Land Trusts 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, 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:

- [Jessica Obodoechi](#), Education and Training Manager– [Ontario Land Trust Alliance](#) (supporting land trusts in Ontario and Atlantic Canada - English speaking)
- [Brice Caillié](#), Director General, – [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)
- [Renata Woodward](#), Executive Director – [The Alliance of Canadian Land Trusts](#) (supporting land trusts nationally)

## FUNDING

WHC is the sign off authority on all funds and funding agreements for successful projects under the NHCP-LTCF. WHC reserve the right to award partial funding to eligible land trusts.

Please also note that:

- NHCP-LTCF funds are allowed to be combined with other Canadian federal funds on the same project, as long as funds go towards **unique (separate) expenditures and NEW\* hectares are prorated** (see program requirement details).
  - Proof that federal funds spent on Unique (separate) expenditures is required.
- Other Canadian federal funds cannot be used as matching funds for NHCP-LTCF funds; and,
- If your project is receiving funding from other federal government sources, hectares may be shared between programs. **HOWEVER**, hectares must be prorated based on percentage of Government of Canada funding received, **using the method described herein. Double counting of hectares must not occur.** For details see section [A-3o](#)

Eligible projects that are not initially approved for funding 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 reallocating 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 SMALL GRANT ELIGIBILITY & REQUIREMENTS

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

- a) ***Application Form Deadline:*** Application Forms will be accepted between **June 19<sup>th</sup>, 2023 at 1:00pm (ET) and September 1<sup>st</sup>, 2023 at 8:00 pm (ET)** (or once all funds are allocated) for projects with a closing date between April 1<sup>st</sup>, 2023 and NEW\* February 15<sup>th</sup>, 2024.

**Note:** If NHCP-LTCF funds are **required to close your project, your closing date must be August 13<sup>th</sup>, 2023, or later**, in order to allow for adequate administrative processing time, collection of required documentation and release of funds from WHC.

Please note that applications will be considered in the order in which they are submitted, on a first-come, first-served-basis; however, Applicants are encouraged to take their time and submit accurate, completed applications.

WHC will be regularly updating its [website](#) during the application window to indicate the amount of funds that are still available.

- b) ***Project Finalization Deadline:*** The deadline for finalizing NHCP-LTCF project deliverables and submitting all final documentation to receive the final installment is **NEW\* March 31<sup>st</sup>, 2024 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 Small Grant Program, Applicants must meet all of 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**

Only one project may be proposed on each Application Form. **A land trust may submit a maximum of two\* project proposals with funding asks between NEW\* \$5,000.00 and \$50,000.00 each to submit to the Small Grants program, for immediate consideration.**

Application forms will be reviewed on a first-come, first-served basis until all funds are awarded; applications must be complete and meet eligibility requirements in order to be considered.

The same project cannot receive funding under multiple LTCF grant programs. Waitlisted Large Grants projects may elect to submit a revised project to the Small Grants or Quick Grants programs; however, if funds are awarded under the Small or Quick Grant program, the project will be removed from consideration under the Large Grants program.

*\* Applicants may submit additional Application Forms (projects); however, Application Forms over and above the maximum of two for immediate consideration will be added to the “waiting list.” Eligible waiting list projects will only be considered after the September 1<sup>st</sup>, 2023 application deadline, if program funds have not been fully allocated at that time.*

#### **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’s Target (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.

**NOTE:** Proposed projects that do not consist of traditional fee simple or conservation agreement transaction or conservation mechanism, may be considered on a case by case basis and would require ECCC approval. Contact WHC staff in advance of application submission to review.

**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<sup>st</sup>, 2023** and **February 15<sup>th</sup>, 2024**.
- Land trusts are expected to commit to protecting the number of hectares presented in the application, regardless of the number of landowners or parcels.
- **NEW\*** If an awarded project fails to close successfully by **January 15, 2024**, the awardee will be required to attest to a 95% confidence that close will complete by February 15, 2024. They will also be required to expand on projects risks for WHC's information.

**Note:** Projects that do not close by January 15, 2024 may be at risk of forfeiting LTCF award, in part or in full.

**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 \$5,000.00 in NHCP-LTCF funds per Small Grants project, and therefore, per Application.

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

Applicants may request up to a maximum of \$50,000.00 in NHCP-LTCF funds per Small Grants project, and therefore, per Application.

**f) Acquisition Project Type**

The acquisition of fee simple lands or [Conservation Agreements](#) are eligible project types under the NHCP-LTCF. If your project involves other methods of securement, please contact WHC staff prior to application submission.

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

**NOTE:** For conservation agreements/easements in **Quebec**, only the "Real and Perpetual" conservation agreement/easement type is acceptable under the program.

**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,
- explain 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. is eligible to count towards Canada's Target;
  - 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 2019* 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 **maybe considered, on a case by case basis. If this is the case, please contact WHC in advance of application submission.**

**k) Dispositions After Closing**

Land trusts must receive approval from ECCC, through WHC, 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:

- be a registered Canadian charity that is in compliance or substantially in compliance with the Canadian Land Trust Standards and Practices 2019 or *Guide des bonnes pratiques en intendance privée: aspects juridiques et organisationnels*; or,
- be a 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,
- be 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](#).

**Note:** Reviews for a disposition request requires a timeline of no less than 2 months.

**NEW\* Land Securement Details:**

“Land Securement” means an acquisition by the Final Recipients of a legal interest or a real right in a property, with the objective to conserve and protect Canada’s habitat and biodiversity. The legal interest or the real right may be acquired by a fee simple purchase, a lease, a conservation easement, a covenant, a servitude, an acquisition of development rights, such as mineral, timber and exploration rights. See applicable Program Guidelines and/or contact WHC staff, for other types of agreements that may be allowable.

The Final Recipient (Awardee) that acquires land(s) with contribution funds provided under the NHCP-LTCF, to do land securement initiatives and projects, **must comply with the following conditions:**

- i. Eligible land securement initiatives and projects will be those that contribute directly to enhanced coverage, ecological integrity and connectivity of Canada’s network of protected and conserved areas, protection and recovery of terrestrial species at risk, and prevention of healthy species, including migratory birds, from becoming at risk.
- ii. WHC shall be required to seek prior written approval from ECCC before a Final Recipient (awardee) transfers, sells, disposes, or encumbers lands, or any portion thereof, secured with funds from ECCC. Canada’s approval will be contingent, among other things, on whether the transfer, sale, disposal and encumbrance meets the objective set out in the concept above.
- iii. In the event the land, or any portion thereof, secured with funds from ECCC is sold, the recipient shall provide an attestation that the price obtained is at, or above fair market value.

- iv. In the event the land, or any portion thereof, secured with funds from ECCC is transferred, sold, disposed or encumbered in a manner inconsistent with the terms and conditions of the NHCP-LTCF program, the recipient (awardee) shall repay to ECCC the greater of:
- the percentage of the proceeds of the disposition (sale), proportional to the initial funding for the securement project; or,
  - the percentage of the fair market value of the portion of the property (at the time of disposition), proportional to the initial funding for the securement project.

**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.

**NEW\*** If there will be joint title ownership at closing, **the applicant must indicate this on their application submission** and ensure that all program requirements, concerning joint title ownership, are met.

**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 Awardee 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<sup>st</sup>, 2022 and March 31<sup>st</sup>, 2024** 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 **MILESTONE 2: November 1<sup>st</sup>, 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 \$100,000.00, but the landowner has agreed to a lower purchase price of \$90,000.00, the difference between \$100,000.00 and \$90,000.00 (= \$10,000.00) 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 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) Multiple Sources of Federal Funding**

If your project is receiving funding from another federal government source, as well as the NHCP-LTCF program, the following will be required:

#### **NEW\***

- **WHC NOTIFICATION MUST OCCUR AT APPLICATION:** WHC is to be notified of the use of other federal funds on a project and provided the below required confirmations, **AT APPLICATION**.
- Signed confirmation:
  - of the total amount of other federal funds being used toward the LTCF project (this amount cannot change following application submission)
  - that federal funds will be used for unique (separate) expenditures and appropriate proof will be provided (audit report details and receipts, if requested);
  - that the project audit report submitted at final reporting will sufficiently and clearly show distinct expense and match details concerning other federal funds, from LTCF funds (this is meant to verify that federal funds have not paid for the exact expense twice. As such, excluding multiple federal funding sources from an “expense category” within the same project is not required, but IS HIGHLY RECOMMENDED, as a good way to keep the expenses and match requirements well organized);
  - that claimed LTCF hectares have been identified by the Applicant on a prorated basis aligning with the below example; (the awardee must claim full project hectares under the LTCF, if the other federal program does not require hectares); and,
  - that no double counting of hectares has occurred across federal programs,

#### **Example of prorating hectares (for Large Grants):**

Total Project Hectares: 200

Total Project Federal Funding: \$150K

**NHCP**

**Other Fed Funding Source**

ECCC funding = \$100K (66.67% of \$150K)  
 LT Match = \$250K (from non-Fed sources)  
 Hectares claimed = 133.4 (66.7 % of 200)

ECCC funding = \$50K (33.33% of \$150K)  
 LT Match = \$150K (from non-Fed sources)  
 Hectares claimed = 66.6 (33.3% of 200)

- Separate and complete project budgets showing expenditures breakdowns and match source breakdowns, per federal funding source (WHC budget template to be used)
- Confirmation that the LTCF match ratio claimed will be met without the use of any federal funds
- Other information as required

**p) 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-3q: Stewardship Endowment Fund Accounting](#).

**q) 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 project 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 project 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.

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

For projects requesting NHCP-LTCF funds for Purchase Price/Cost of Land or Conservation Agreement: The amount of stewardship endowment required under the NHCP-LTCF is determined by using the table below:

<b>Value of Land or CA</b>	<b>Stewardship Endowment Contribution Required</b>
<i>Less than \$50,000.00</i>	<i>Minimum of \$5,000.00</i>
<i>&gt;\$50,000.00</i>	<p><i>Note that a minimum of \$5,000.00 is required, regardless of which option is used to determine stewardship endowment contribution.</i></p> <p><i>There are 2 approaches to choose from:</i></p> <ol style="list-style-type: none"> <li><i>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.</i></li> <li><i>2. apply a flat rate of 10% of the fee simple land value or Conservation Agreement value up to a maximum cap of \$400,000.00.</i></li> </ol> <p><b>***Stewardship calculator must be used when 10% value surpasses maximum cap of \$400,000.00</b></p>

At Final Reporting, the Awardee will be required to verify and sign off on the fact that the correct amount of Stewardship Endowment Funds have been transferred into the land trust’s endowment account and sourced appropriately (attestation and bank transfer record, or similar).

For projects requesting NHCP-LTCF funds for associated costs only (no NHCP-LTCF funds for acquisition/securement): At Final Reporting, the Awardee will be required to submit an attestation signed by a senior officer confirming the funds have been transferred into a distinct fund for the support of the project.

s) **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 two-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 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 (using approved template provided in the Communications Toolkit) to WHC at least six weeks before the proposed announcement date for review by WHC and ECCC Communications. As required, WHC will work with the Awardee and ECCC to acquire needed ECCC approval and Ministerial quote. 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 and ECCC. Please allow at least three week (from time of final draft submission to ECCC) for approval.
- **NEW\* Draft sign designs are to be submitted** to WHC as early in the program year as possible but **no later than MILESTONE 1: September 1<sup>st</sup>, 2023.**
- 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 Awardee in a timely manner and approved by WHC and ECCC.

- **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 and 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 land via eligible transaction type or mechanism. [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 **2023-2024 fiscal year** (April 1<sup>st</sup>, 2023 to March 31<sup>st</sup>, 2024).

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

In the case of reimbursement of external product or service costs, only invoices addressed or made out to the Awardee will be eligible for reimbursement. Expenses that have been (or will be) submitted for reimbursement under other active grants or programs are not permitted to also be submitted for reimbursement under the Small Grants program.

*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.

- As per normal business practice, Awardees are expected to keep appropriate records, invoices and supporting documentation of all expenditures and project activities, including staff time expensed under the NHCP-LTCF program.
- If selected for a project audit, the Awardee will be required to provide records, invoices and supporting documentation associated with the project to WHC.

### Chart 1 – Expense Eligibility under the NHCP-LTCF - Small 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<sup>st</sup>, 2023 and March 31<sup>st</sup>, 2024**.
- NHCP-LTCF funds cannot be used to cover rebatable/refundable taxes.
- Associated project expenses that occurred between **April 1<sup>st</sup>, 2022 and March 31<sup>st</sup>, 2024** may be applied to the project as **matching funds** (provided that the expenses were not paid for with other sources of Canadian federal funds).

Expenditures	Is the expense eligible to receive NHCP-LTCF program funds?	Is the expense eligible to include as Matching Funds (Cash)?	Is the expense eligible to include as Matching Funds (In-Kind)?
Purchase Price/Cost of Land or Conservation Agreement	✓	✓	X
Donated Value of Land or Conservation Agreement	N/A	N/A	✓
Stewardship Endowment Fund	X	✓	X
Fundraising Costs	X	✓	✓
<p><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>.</p> <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>	✓	✓	✓
<p><b>Salaries and wages</b> – including all existing benefits for employees and contract staff, and mandatory employment-related expenditures.</p> <ul style="list-style-type: none"> <li>• Includes all Staff time necessary for planning, negotiating, managing,</li> </ul>	✓	✓	✓



<i>coordinating and completing the project.</i>			
<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><i>Includes utilities, phone, internet, etc.</i></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 <b>5% of the organization’s occupancy cost</b> , as reported on line 4850 of the most recent T4033 - CRA Registered Charity Information Return, <b>to a maximum of \$3,000.00.</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> <p><b>Note:</b> a maximum of \$5,000.00 may be requested in LTCF funds under this category (including printing, production, distribution expenditures).</p>	✓	✓	✓
<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>	✓	✓	✓

<p><b>Cost associated with eligible land planning, land securement, stewardship initiatives and Projects such as appraisals, surveys, baseline documentation, land transfer tax.</b></p> <p>Includes:</p> <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<sup>st</sup> and March 31<sup>st</sup> of the associated NHCP-LTCF program round.</i></li> </ul> <p><b>Note: a maximum of \$10,000.00 can be requested</b> in NHCP-LTCF funds for the development of management plans that are associated/required as part of permanent protection.</p>	✓	✓	✓
<p><b>Land Transfer Tax (LTT) and Sales Tax (excluding rebatable portion)</b></p>	✓	✓	X
<p><b>Property Tax (only when paid as part of closing)</b></p>	✓	✓	X

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

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

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

Applicants must be prepared to sign a legal agreement (the "[NHCP-LTCF Funding Agreement](#)") with the Wildlife Habitat Canada (WHC).

**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 possible 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 Financial Check**

As per normal business practice, Awardees are expected to keep appropriate records, invoices and supporting documentation of all matching funds and project expenditures. Please review section [A-5d: Project Audit](#) carefully.

For Final Reporting, Awardees must provide WHC with:

- completed Financial Reporting Template (**automated**);
- all project expenses itemized in the format provided, and demonstrate that rebatable tax portions have been removed for NHCP-LTCF expenses;
- copies of individual invoices or receipts for both [NHCP-LTCF expenses](#) and [matching funds](#) that are over the amount of \$1,000.00.

**Note:** WHC may elect to perform a random audit of NHCP-LTCF project expense invoices and/or receipts of any amount.

The Financial Reporting Template must demonstrate the following:

- a minimum 1.5:1 match ratio;
- a list of all eligible expenditures by expense category;
- a breakdown of expenses applied to the NHCP-LTCF funds vs. those covered by matching funds (cash vs. in-kind);
- a breakdown of cash and in-kind match by contributor type and contributor source;
- include attachments of any individual invoices and/or receipts over the amount of \$1,000.00; and,
- that no rebatable taxes have been included in NHCP-LTCF funds.

All required financial documentation must be received by WHC no later than **March 31, 2024 at 8:00pm (ET)**. All reporting and supporting documentation must be submitted via the [online platform](#). Further instruction on how and when submissions are to be completed will be provided to Awardees.

The final installment will be issued by WHC, following WHC's receipt and approval of the project's Financial Reporting and backup verification.

#### d) **Project Audit**

Projects may be selected for a program or financial audit by internal WHC staff or an external Chartered Professional Accountant (CPA) to ensure compliance with the terms and conditions of the Small Grants program and the Funding Agreement.

Awardees are required to maintain detailed records and supporting documentation associated with the project. If selected for an audit, or upon WHC's request, the Awardee, as demonstrated proof of fulfilling program requirements, will be required to provide any project-related documentation included under NHCP-LTCF Small Grant program guidelines, such as (but not limited to):

- Confirmation of BDR registration and/or copy of completed BDR (*Conservation Agreements only*);
- Bank statement or other document confirming the amount of the existence of new/additional stewardship endowment contribution;
- Documents demonstrating compliance with the CLTSP 2019 (e.g., applicable policies, Board resolution, etc.);
- Development and implementation of management plan (*Fee Simple only*);
- Proof of stewardship activities undertaken with NHCP-LTCF funds;
- Copy of most recent financial statements submitted to CRA;
- Records, receipts, and/or invoices to support matching funds or NHCP-LTCF expenses;
- Statement of adjustments (if applicable).

If the Awardee does not provide requested documentation or it is determined that the audited documentation does not support the information claimed in Final Reporting, this may result in the forfeit of the final installment, at WHC's sole discretion.

#### e) **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. 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.

- **A full appraisal will be required by MILESTONE 1: September 1<sup>st</sup>, 2023**, or sooner as completed, and must be submitted no later than 30 days prior to close.
- **NEW\*** **The purchase price of the project land cannot exceed the FMV stated in the appraisal.** If there was a special circumstance concerning the project that caused the purchase price to be above the FMV indicated in the submitted appraisal (by no more than 5%), please contact WHC directly to discuss.

NHCP-LTCF funds can only be used to fund a purchase price that is identical to the FMV listed in the approved appraisal, unless otherwise approved by WHC, or a purchase price that is less than the FMV listed in the approved 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.

**Note:**

- **To be an eligible expense**, the cost for an appraisal must have been incurred after April 1<sup>st</sup>, 2023.
- A full appraisal needs to be submitted, and approved by WHC, 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, **and the remaining value donated**, the difference should be included in the column “Matching Funds (In-Kind)” and proof of donation will be required with Reporting. Proof of donation can be provided by:

- add the donation amount in the APS, or
- landowner must provide a letter attesting to the donation amount.

## **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, and a **maximum of two Application Forms (projects) with grant asks between \$5,000.00 and \$50,000.00 each to the Small Grants program** for immediate consideration.

Applicants may submit additional Application Forms (projects); however, Application Forms over and above the maximum of two for immediate consideration will be added to the “waiting list.” Eligible waiting list projects will only be considered after the **September 1<sup>st</sup>, 2023** application deadline, if program funds have not been fully allocated at that time.

#### **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 (or NCC's OQO 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 must 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 documentation required in the Application Form is listed under [Chart 2: Checklist of Required Documentation for Application and Installments– Small 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: Review of the Application Form***

**a) When will my Application Form be reviewed?**

Application forms are reviewed as they are submitted.

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

Each Application Form is reviewed by WHC.

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

Applications are reviewed and considered by WHC in the order in which they are received, on a first-come, first-served basis. Each Application Form will be reviewed for eligibility. If the Application Form does not meet eligibility requirements or is incomplete, WHC reserves the right to reject the project and the Applicant will receive a rejection letter. The Applicant cannot re-apply under the NHCP-LTCF in the same program year, with the same (unsuccessful) project.

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

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

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

Award/rejection letters will be distributed approximately 4-6 weeks after the Application Form has been received and processed.

**Important Note:** If NHCP-LTCF funds are required to close your project, your closing date must be on August 13<sup>th</sup>, 2023 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 \$20,000.00 of NHCP-LTCF Program funds:

*First installment* = \$16,000.00 (\$20,000.00 less a 20% holdback of \$4,000.00)

*Final installment* = \$4,000.00 (20% of \$20,000.00)

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

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

Awardees will be required to complete an **Interim Reporting Form** at **MILESTONE 1: September 1<sup>st</sup>, 2023**, 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 and may jeopardize future funding consideration under the NHCP-LTCF.

### **c) When will WHC release first and final installment?**

#### **IMPORTANT:**

- **Installment invoices must be made out to Wildlife Habitat Canada**, and submitted to WHC for processing.
- **Note:** WHC requires at least 2-3 weeks to process and release payment installments.

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

**Final Installment:** All correct, required documentation, listed in the [Chart 2 - Checklist of Required Documentation for Application and Installment - Small Grants](#), must be submitted to WHC by **March 31<sup>st</sup>, 2024 8:00 PM (ET)**. Once reviewed and approved by WHC, the final installment will be released.

**Important:** All project already closed at first installment **must** submit a post-closing report (Transfer deed) or Land title.

### **d) How will WHC release the first and final installment in year 5?**

WHC 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.

## Chart 2 – Checklist of Required Documentation for Application and Installments - Small Grants

### CAUTION:

- If an Applicant fails to submit a complete application 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 milestone date and/or deadline, the Awardee may be required to forfeit funding and return any NHCP-LTCF funds to WHC, immediately.
- If the Awardee fails to submit all required documentation by the Final Reporting deadline (March 31<sup>st</sup>, 2024), final installments will not be released and the Awardee may be required to forfeit funding and return any NHCP-LTCF funds to WHC, immediately.

Documentation to be submitted with the application; 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: <ul style="list-style-type: none"> <li>• <a href="#">LTCF Excel template</a> to be used; filled out completely and accurately.</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 and other information as requested.</p>	✓			



<p>4) Project Budget – NHCP-LTCF template (Year 5) must be used.</p> <p><i>Invoices must be addressed to WHC and submitted to WHC for processing.</i></p> <p><b>NEW*</b> <i>If applicable, the WHC Budget Template (tab) for multiple federal sources must be used.</i></p>	<p style="text-align: center;">✓</p> <p style="text-align: center;"><a href="#">Project Budget</a></p>		<p style="text-align: center;">✓</p> <p style="text-align: center;"><a href="#">Project Budget and Invoice</a></p> <p style="text-align: center;"><i>(Minimum 30 days prior to closing date)</i></p>	<p style="text-align: center;">✓</p> <p style="text-align: center;">Financial Report and Invoice</p>
<p>5) 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* (no more than 1 year old) must be provided to WHC no later than <b>MILESTONE 1: September 1<sup>st</sup>, 2023</b>, or sooner as completed, and must be submitted no later than 30 days prior to close.</li> </ul> <p><i>*A full appraisal meeting the requirements in <a href="#">Section A-5d</a> is required for release of the First Installment.</i></p>	<p style="text-align: center;">✓</p> <p style="text-align: center;"><b>Assessed Value with rationale; draft appraisal</b></p> <p style="text-align: center;"><u>OR</u></p> <p style="text-align: center;"><b>Full appraisal, if complete</b></p>	<p style="text-align: center;">✓</p> <p style="text-align: center;"><b>Full Appraisal</b></p> <p style="text-align: center;"><i>(no later than MILESTONE 1 September 1<sup>st</sup>, 2023)</i></p>	<p style="text-align: center;">✓</p>	
<p>6) Fully signed <a href="#">Funding Agreement</a></p> <p><i>The signed Funding Agreement must be returned to WHC <b>within 3 weeks of notification letter date.</b></i></p> <p><b>Note:</b> <i>Delay in providing the signed Funding Agreement may result in termination of award offer. First Installment will not be released until the WHC Funding Agreement is fully signed.</i></p>	<p style="text-align: center;">✓</p> <p style="text-align: center;"><b>New* Signed Funding Agreement</b></p> <p style="text-align: center;"><i>(within 3 weeks of the date on the Notification of Award Letter</i></p>	<p style="text-align: center;">✓</p>	<p style="text-align: center;">✓</p>	
<p>7) <b>* NEW</b> Confirmation of Level of Risk to Close, if applicable.</p> <p>If a project has <b>not yet closed by JANUARY 15, 2024</b> the awardee will be required to attest to a 95% confidence that close will complete by February 15, 2024. They will also be required to expand on projects risks for WHC’s information.</p>			<p style="text-align: center;">✓</p> <p style="text-align: center;">If the project has not successfully closed by <b>January 15, 2024</b></p>	

<p><b>Note:</b> Projects that remain unclosed by January 15, 2024 may be at risk of forfeiting the project award, in part or in full.</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 non-binding letter of intent</b> identifying the landowner’s interest in proceeding with the project is required;</li> </ul> </li> <li>• <b>A signed APS/Option to Purchase/Signed Donation Agreement</b> must be provided to WHC no later than <b>MILESTONE 2: November 1<sup>st</sup>, 2023</b>, or sooner as completed, and must be submitted no later than 30 days prior to close.</li> <li>• A copy of a <b>preliminary title report</b>/title search from legal counsel which acknowledges the Fee Simple land is free and clear of financial encumbrances;</li> <li>• A copy of the <b>post-closing title report</b> (transfer deed) or land title demonstrating ownership.</li> </ul> <p><b>NOTE:</b> All project already closed by first installment <b>must</b> submit a post-closing report (Transfer deed) or Land title.</p>	<p style="text-align: center;">✓ Signed non-binding letter of intent</p> <p style="text-align: center;">OR</p> <p style="text-align: center;">Signed APS/Option to Purchase/Signed Donation Agreement/Intent to Donate</p>	<p style="text-align: center;">✓</p> <p style="text-align: center;"><b>Preliminary title report</b>/title search <i>(no later than MILESTONE 1 September 1<sup>st</sup>, 2023)</i></p> <p style="text-align: center;">✓</p> <p style="text-align: center;"><b>Signed APS/Option to Purchase/Signed Donation Agreement</b> <i>(no later than MILESTONE 2 November 1<sup>st</sup>, 2023)</i></p>	<p style="text-align: center;">✓</p> <p style="text-align: center;"><b>Post Closing Title Report</b> for closed projects</p> <p style="text-align: center;">AND</p> <p style="text-align: center;">✓</p> <p style="text-align: center;">Signed APS/Option to Purchase/Donation Agreement</p> <p style="text-align: center;"><i>(must be submitted at minimum of 30 days prior to close)</i></p>	<p style="text-align: center;">✓</p> <p style="text-align: center;"><b>Post Closing Title report</b>/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 style="text-align: center;">✓</p> <p style="text-align: center;"><b>NEW*</b> Draft sign design submitted to WHC <i>(no later than MILESTONE September 1<sup>st</sup>, 2023)</i></p>		<p style="text-align: center;">✓</p> <p style="text-align: center;"><b>Approved</b> sign design submitted to WHC with final reporting <i>(no later than March 31, 2024)</i></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>• A <b>signed</b> 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 <b>MILESTONE 2: November 1<sup>st</sup>, 2023</b>, 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 <b>preliminary title report/title search</b> 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 <b>fully signed copy of the Conservation Agreement/easement</b> and a copy of the <b>post-closing title report</b> (transfer deed) or registration that clearly shows the conservation agreement/easement as priority on title, in the land trust’s name.</li> </ul>	<p style="text-align: center;">✓</p> <p style="text-align: center;"><b>Signed non-binding letter of intent</b></p> <p style="text-align: center;"><u>OR</u></p> <p style="text-align: center;"><b>Signed Conservation Agreement/Easement</b></p> <p style="text-align: center;"><u>OR</u></p> <p style="text-align: center;"><b>Signed APS</b></p>	<p style="text-align: center;">✓</p> <p style="text-align: center;"><b>Preliminary title report/title search</b> <i>(no later than <b>MILESTONE 1</b> September 1<sup>st</sup>, 2023)</i></p> <p style="text-align: center;">✓</p> <p style="text-align: center;">If applicable - <b>Signed APS</b> <i>(no later than <b>MILESTONE 2</b> November 1<sup>st</sup>, 2023)</i></p> <p style="text-align: center;">✓</p> <p style="text-align: center;"><b>Signed Conservation Agreement</b> <i>(no later than <b>MILESTONE 2</b> November 1<sup>st</sup>, 2023 OR 30 days prior to close)</i></p>	<p style="text-align: center;">✓</p> <p style="text-align: center;"><b>Signed</b> Conservation Agreement/Easement, including a letter signed by the landowner (as outlined under “Documentation”)</p> <p style="text-align: center;">Note: If the project includes an APS, the <b>signed APS</b> must also be submitted.</p> <p style="text-align: center;"><i>(must be submitted at minimum of 30 days prior to close)</i></p>	<p style="text-align: center;">✓</p> <p style="text-align: center;"><b>Signed CA/Easement and title report</b> as proof of registration</p>
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<p><b>All Conservation Agreements</b>, a copy of the full <a href="#">Baseline Documentation Report (BDR)</a>.</p> <p><b>Exception:</b> <i>In the event that seasonal conditions prevent the completion of a full BDR report by closing, the landowner and the land trust <b>must sign a schedule for finalizing the full report</b> 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><b>BDR</b></p> <p>OR</p> <p>If exemption granted, a <b>schedule for BDR finalization</b> signed by awardee and landowner(s)</p>
<p>10) <b>An attestation signed by a senior officer confirming that all matching funds (excluding land value) are in place</b>, and no other sources of Canadian federal government funds have been included as match.</p>		<p>✓</p> <p>(no later than <b>MILESTONE 2 November 1<sup>st</sup>, 2023</b>)</p>	<p>(minimum 30 days prior to close)</p>	
<p>11) <b>Completed Financial Report</b> (NHCP-LTCF template must be used), including:</p> <ul style="list-style-type: none"> <li>• copies of any individual receipts over \$1,000.00;</li> <li>• if applicable, must submit evidence of value for <b>all</b> in-kind goods/services;</li> <li>• required confirmation of the SEF.</li> </ul>				<p>✓</p>
<p>12) A copy of the <b>Statement of Adjustments</b> (if applicable).</p>				<p>✓</p>
<p>13) At least <b>one high quality image of the Project property(ies)</b>,* for possible use in ECCC social media and other promotional materials, with authorization to WHC/ECCC for the use of the image(s).</p> <p><i>*In cases of a confidentiality/privacy conflict with this requirement, please contact WHC.</i></p>				<p>✓</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-5b: 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-3i: Conservation Plan for more information.](#)

**Final Recipient:** (also known as Awardee) Means a legal entity to which the WHC shall further distribute funds received under this Agreement in the manner provided in [Section A-2](#). 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.

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

**Volunteer:** 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.

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