



Habitat Acquisition Grant Proposal Guidelines 2018-19

INTRODUCTION

For over 30 years, HCTF has invested funds into acquiring valuable habitat in BC. The hunters, anglers, trappers and guide outfitters of this province pay a surcharge on hunting, fishing and guide outfitting licences, which is provided to HCTF for conservation projects, including conservation land securement. To date, HCTF has contributed over \$20 million dollars towards the purchase of close to 140 conservation properties, helping to secure and manage approximately 23,000 hectares of valuable habitat.

New for 2018-19

HCTF Habitat Acquisition Grant proposals are now eligible to request a one-time contribution towards initial management costs (within 2 years of purchase) and/or a property management endowment contribution directed to benefit the subject property only. This amount will be limited to a maximum of 10% of the request for direct acquisition funds. HCTF recognizes the importance of providing a source of revenue for the management of fish and wildlife habitat, not just the initial securement. This provision for management or endowment expenses will result in additional reporting requirements for successful proponents post acquisition.

ELIGIBILITY

Habitat Acquisition Grants provide funds to secure land for the conservation of fish and wildlife habitat in BC. Properties that enhance public fishing and hunting opportunities are generally given priority consideration. Habitat acquisitions previously funded allow for fishing or hunting on the property, or support such opportunities elsewhere, e.g. fish spawning habitat for a downstream fishery. Properties must be located within British Columbia.

Organization Eligibility

HCTF accepts Habitat Acquisition Grant proposals from many types of organizations: municipal, regional and the provincial government, and land trust and community organizations.

HCTF prefers to receive proposals directly from the organization that will hold title and manage the property, but we recognize that sometimes multiple organizations are involved at different stages of an acquisition project—for example, a local community group might coordinate the acquisition for a property but a larger land trust will ultimately hold title. If the organization submitting the proposal will not be the one holding title or managing the property, be sure to include information on **both** the applicant organization, and the intended title holder and/or manager. Please note that if the applicant is not going to be managing the land, the applicant may apply for the land management/endowment funding; however, HCTF may grant the management funds directly to the organization incurring costs to manage the land.

Eligible Expenditures

The Habitat Acquisition Grant eligible costs are as follows:

- Direct Acquisition Costs – such as Purchase Price, Appraisal fees, taxes, legal fees
- Initial Management Costs and/or Property Endowment contribution up to a maximum of 10% of the amount provided for Direct Acquisition Costs. For instance, if you are requesting \$100K for Direct Acquisition costs, you may request up to \$10K for initial management costs and/or an endowment contribution.
 - Initial management costs refers to activities that will be undertaken within the first two years of purchase to safeguard the features / habitats / populations being protected by this purchase, and may include the preparation of baseline surveys, legal surveys, management plans, or urgent fencing and gate installation. Activities must comply with the eligible activities list included as Appendix 1.
 - The property endowment contribution must be held in an investment and the investment income gained off the endowment used to complete operation and maintenance activities on the subject property.

PROPOSAL AMENDMENTS

Habitat Acquisition Grant proposals are reviewed by our Board in June. If there are any relevant changes to the acquisition project between proposal submission and Board review, applicants are required to apprise HCTF and submit a revised proposal and/or budget where necessary. For example, if any unconfirmed funding is denied, or becomes confirmed, the budget spreadsheet should be updated and resubmitted prior to our Board meeting. This includes any updated information regarding any ecological gift component.

PROPOSAL EVALUATION CRITERIA

Proposals are evaluated against a set of criteria as follows:

- Connectivity to other protected areas*
- Conservation priority (identified in conservation plan for the area)*
- Species richness
- Presence of species or ecosystems at risk
- Protection Urgency/Threat
- Management Urgency or risk to existing values
- Fiscal prudence of organization(s)
- Community Support
- Likelihood of long term security and stewardship
- Value for money
- Public recreational opportunities

*These criteria have been identified as the most important by the HCTF Board of Directors and carry the highest weight in our proposal ranking.

Proposals are reviewed according to the above criteria. The HCTF Board of Directors reviews all proposals and scores / comments from reviewers, and makes final funding decisions.

HCTF staff may also contact local biologists regarding the significance of the conservation values on the property, please let us know if there are any confidentiality issues around the purchase, e.g. sensitive negotiations with the land owner, that may preclude us from contacting others about the proposed property acquisition.

NOTES TO APPLICATION FORM

Note that text should be entered in the box with the grey shading, not in the same box as the question. Please do not alter the questions.

1. PROPONENT (APPLICANT) INFORMATION

- **Field Contact:** If the listed Project Leader is a fundraising specialist, please include an additional contact with on the ground knowledge of the property.
- **Organization Name:** Please include full legal name of the organization.
- **Address:** This is the mailing address for the organization.

4. ORGANIZATION DETAILS

- **Organization type:** Options include Provincial Government, Regional Government, Local Government, NGO. If NGO, include whether the organization is a Land Trust, a registered society and/or registered charity.

6. MAPS AND PHOTOS

- Maps and photos must be included with your application. Include as separate files or in one PDF with the application document. Do NOT include photos and maps directly in the Word document application form. Please list the maps and photos in the table in section 6; don't forget to include the file name(s) if submitted separately.

7. FISH AND WILDLIFE/BIODIVERSITY VALUES

- This section can include detailed information on the property; however, limit to 3 pages maximum.

13. FINANCIAL INFORMATION

- HCTF only funds acquisition projects with a purchase price supported by a current appraisal. As a condition of funding, a copy of the current appraisal must be provided for approved projects.
- If all unconfirmed funding is received, and funding secured is more than your TOTAL PROJECT COSTS, HCTF would anticipate a revised funding request at a lower amount.

NOTES TO BUDGET SPREADSHEET

The HCTF Acquisition Proposal Budget spreadsheet is locked except for the green-shaded cells where you may enter information.

Date last updated: This field is included since we require an updated budget if the overall funding scenario changes between proposal submission and Board review in June (e.g., a funder is confirmed). If you submit an update, include the date here. Initially use the date the proposal is submitted.

PROJECT COSTS

Direct Acquisition Costs

Purchase Price: The amount you expect to pay for the property, including any donation by the landowner. This amount must be supported by a property appraisal before any funding is granted. If there is an ecological gift component, this amount should be equal to the Fair Market Value. This amount should be the same as noted in the Financial Information section of the application form.

Appraisal fees: The amount paid to complete an appraisal of fair market value of the property.

Closing costs: These include legal fees and taxes. Please indicate in the notes section at the bottom of the spreadsheet if other costs over legal and taxes are included here.

Other (specify): If any costs are included here, specify and provide details in the notes section at the bottom of the spreadsheet.

Initial Management Costs/Endowment Contribution

HCTF will fund up to 10% of the amount requested for direct acquisition costs for initial management costs and/or an endowment contribution benefiting the subject property. Note the spreadsheet will automatically calculate the percentage of this request and this should not be more than 10%.

Initial Management Costs: Please include any initial management costs for the first two years post-acquisition. There are two fields: one for total project costs and one for any of these costs you request HCTF to fund.

Endowment contribution: If you are fundraising to include an endowment contribution to cover land management costs for the property, please include the fundraising target under **Total Project Costs** and any request from HCTF under **Contribution requested from HCTF**.

PROJECT FUNDING

Confirmed funding: List all confirmed funders and the amount committed, including both cash and in-kind donations, such as an ecological gift.

Unconfirmed funding: List all unconfirmed funders and the amount requested, including both potential cash and in-kind donations, such as an ecological gift.

- Please ensure only one major funding partner is included per row. It is okay to lump smaller donations (<\$1000 each) as “other donations” or to include a line for larger donations by private citizens as “individual donors”. If you need more rows, please contact HCTF and we can provide an unlocked version of the form so you can add more rows.

QUESTIONS

Please contact Christina Waddle, Conservation Specialist at HCTF if you have any questions about the application process or technical issues with any of the forms: Christina.Waddle@hctf.ca or 250-940-3011.

Appendix 1: Habitat Acquisition Grant Eligible and Ineligible Activities

Eligible Activities and Expenses

Direct Acquisition Costs

- Purchase price
- Appraisal Fees
- Taxes, including transfer taxes
- Legal fees

Initial Management Expenses

These eligible activities are intended to help safeguard the features / habitats / populations being protected by the purchase and should provide direct conservation benefit.

Operations

Those land management activities that involve the management and administration of lands and waters including:

- Mapping and boundary delineation
- Management planning, specifically high-priority management plans, resource conservation plans, enhancement or restoration plans
- Undertaking resource inventory and analysis
- Managing human activities on the lands - management activities associated with community education regarding the purpose of the lands and the value of the natural assets
- Providing operational oversight of the maintenance activities taking place on the lands
- Developing maintenance programs, project plans, staff/volunteer plans for site management
- Addressing immediate site issues and needs

Maintenance

Those activities that involve maintaining, repairing, restoring and controlling of land, including:

- Restoring and maintaining site-specific natural habitats such as planting eroded slopes and riparian zones
- Repairing and maintaining built assets (e.g., Fences, shelters, dams, culverts) if they provide a demonstrable conservation benefit
- Building new assets required for conservation (e.g., Exclusion zones, information shelters, new fencing)

- Removing invasive species

Property Endowment Contribution

- This contribution must be added to an investment and the investment income gained off the investment benefit the subject property only.¹

Ineligible Activities & Expenses

The following activities are ineligible for Habitat Acquisition Grant funding, including revenue from an endowment contribution:

Acquisition Costs

- Fundraising costs
- Labour costs for coordinating acquisition project

Initial Management Expenses

- Conservation covenant monitoring
- Legal fees (post acquisition)
- Insurance cost
- Strategic / higher level land use planning or ecosystem planning
- Residential tenancy agreements/ rentals
- General festivals / tours/ events that do not directly pertain to O&M of the properties
- General patrols
- General lease administration (e.g., R/Ws, lease modifications, tax exemptions)
- Organizational fundraising
- Cultural, heritage, historical or architectural operations and maintenance activities

In addition to the items above, in accordance with HCTF's general corporate guidelines, the following items are also ineligible:

- Non-applied Research, such as:
 - Research not related to the increased understanding of population baselines and conservation status of species, and/or
 - Research that does not identify key opportunities for restoration, enhancement, maintenance, or acquisition.
- Training costs for project personnel
- Law enforcement activities
- Fish rearing, farming, stocking, or hatcheries projects

¹ HCTF and successful proponents will discuss how reasonable assurance can be provided that the endowment contribution will be made to benefit the subject property only.

- Wildlife Rescue Centres
- Captive breeding and rearing with the exception of activities that are a critical step toward population recovery
- Feeding of wildlife species with the exception of activities that are part of population recovery projects
- Control of wildlife species (note that we will consider control of invasive, non-native wildlife species)
- Salaries for regular government employees
- Salmon-only projects that do not also bring benefit to freshwater and terrestrial species or habitats
- Marine projects outside of intertidal and estuary zones
- Mapping-only projects that are not integral to the development of a larger, eligible HCTF project
- Development or production of fishing and hunting, tour, or curriculum guidebooks or publication materials
- Information projects on regulations or stocking
- Conferences
- Production or sponsorship of commercial programs
- Stand-alone interpretative services that are not integral to the development of a larger, eligible HCTF project
- Creation or management of stand-alone electronic databases, websites or file systems