



Habitat Acquisition Grant Application Guidelines 2023-24

INTRODUCTION

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.

Habitat Acquisition Grants provide funding for direct acquisition costs and may also include a request for initial management costs and/or property management endowment contribution.

The HCTF Board sets aside a budget of \$500,000 for this program each year and generally funds 2-3 projects. There is currently no matched funding requirement, but HCTF prefers to see that other funders will be contributing to an acquisition project.

ELIGIBILITY

Habitat Acquisition Grants provide funds to secure land for the long-term conservation of fish and wildlife habitat in BC. Properties must be located within British Columbia.

For 2023, HCTF will continue to prioritize acquisition applications that seek to increase conservation outcomes for fish, wildlife and their habitats, provide access for a variety of uses such as hunting, fishing, and non-motorized recreation and fit one or more of the following criteria:

1. *Contribute to the conservation of wetland or grassland wildlife habitats.*
2. *Increase connectivity to adjacent protected lands or important habitats to further build complexes of intact habitat.*
3. *Contribute to the conservation of habitats near urban settings to increase opportunities to connect people to nature.*
4. *Demonstrate resiliency to climate change and/or address stressors linked to climate change impacts.*

Organization Eligibility

HCTF accepts Habitat Acquisition Grant proposals from many types of organizations including municipal, regional, and provincial governments, First Nations, land trusts 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 of 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 still apply for land management/endowment funding; however, HCTF may grant the management funds directly to the organization incurring costs to manage the land.

HCTF will not fund property acquisitions where the proponent organization is already the owner of the property and is looking to finance debt recovery or pay off the mortgage.

Eligible Expenditures

The Habitat Acquisition Grant can only be used to cover the following eligible costs and related activities:

- 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 an additional \$10K for initial management costs and/or an endowment contribution. Eg. 100,000 +10,000 = 110,000 requested from HCTF.
 - Initial management costs include 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 conducting baseline surveys and mapping, legal surveys, developing management plans, urgent fencing and/or 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 must be used for operation and maintenance activities on the subject property.

PROPOSAL AMENDMENTS

Habitat Acquisition Grant proposals are reviewed by the HCTF Board in June. If there are any relevant changes to the acquisition project between proposal submission and Board review in June, applicants are required to apprise HCTF and submit a revised proposal and/or budget.

For example, if any unconfirmed funding is denied, or if funding becomes confirmed, the budget spreadsheet should be updated and resubmitted near the end of May. This includes any updated information regarding any ecological gift component.

PROPOSAL EVALUATION CRITERIA

Proposals are evaluated against the following criteria:

- **Significance:**
 - Connectivity to other conservation areas (e.g. parks, NGO protected lands, etc.)*
 - Conservation priority (identified in a conservation plan for the area)*
 - Species richness
 - Presence of species or ecosystems at risk or other significant fish, wildlife, or habitat values
- **Threat:**
 - Protection urgency/threat
 - Management objectives
- **Security of Investment:**
 - Financial Management of organization(s)*
 - Community support
 - Likelihood of long-term security and stewardship
 - Value for money
- **Public recreational opportunities, including fishing and hunting**

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

In addition to the criteria above, properties with intact ecosystems are generally given priority over those requiring significant restoration.

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 landowner that may preclude us from contacting others about the proposed property acquisition.

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 the time of proposal submission and Board review in June (e.g., a funder is confirmed). If you submit an update, include the date. 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 other than 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 (optional)

HCTF will fund up to 10% of the amount requested for direct acquisition costs to cover 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. Examples are included in Appendix 1. There are two fields: one for total project costs and one for any of these costs for which you are requesting HCTF funding.

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. Smaller donations (<\$1000 each) can be lumped as “other donations”. 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.

PROPOSAL APPROVALS and REPORTING

Successful proponents will be notified by late JULY. Notification of successful proposals will include a standard list of Funding Conditions which include:

- Copy of completed appraisal
- Copy of signed purchase agreement
- Written confirmation of other funding partners
- Written agreement that non-mechanized public access will be allowed on the subject property for recreational activities including, but not limited to, hunting, fishing, and wildlife viewing, unless those activities are precluded by provincial legislation, regulation, or local bylaw.
- A 1-2 page communication plan for HCTF's review and approval.
- Others as required.

Once funding conditions have been met, funds will be released upon HCTF's receipt of a signed Conditional Grant Agreement (CGA) and proof of insurance. The CGA typically includes 90% payment of funds, with a 10% holdback upon completion of the acquisition project.

The acquisition is considered complete, once an Acquisition Report Form is submitted to HCTF. The report form can be found on the reporting tab at [Habitat Acquisition Grants - Habitat Conservation Trust Foundation \(hctf.ca\)](https://www.hctf.ca/Habitat-Acquisition-Grants-Habitat-Conservation-Trust-Foundation). The following documents need to be included with the along with the grant report.

- Copy of the Land Title(s)
- Copy of the management plan/management direction statement (if completed)
- Copy of the Press Release announcing the acquisition
- Copies of any newspaper clippings or other print media
- Copies of any related documents (covenants, leases, etc.), if applicable
- Photographs as jpeg files
- Invoice for 10% holdback

QUESTIONS

Please contact Barb von Sacken, Conservation Lands Program Coordinator at HCTF if you have any questions about the application process or technical issues with any of the forms: bvonsacken@hctf.ca or 250-940-3013.

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

- Addressing immediate site issues and needs
- Mapping and boundary delineation including legal surveys
- Baseline surveys and mapping
- Management planning, specifically high-priority management plans, resource conservation plans, enhancement, or restoration plans
- Species and ecosystem inventory, mapping and analysis including SAR
- Undertaking resource inventory and analysis
- Develop programs and project plans for staff and volunteer management activities.
- Managing human activities on the lands - including activities associated with restoration, maintenance, and community education regarding the purpose of the lands and the value of the natural assets
- Provide operational oversight of the maintenance activities taking place on the lands

Maintenance

Those activities that involve maintaining, repairing, and restoring 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 interest derived from the investment must be used to 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 an acquisition project

Initial Management Expenses

- Conservation covenant monitoring
- Legal fees (post acquisition)
- Insurance costs
- Strategic/higher level land use planning or ecosystem planning
- Residential tenancy agreements/ rentals
- General festivals/tours/events that do not directly pertain to operations and maintenance of the properties
- General patrols
- General lease and administration of other property interests (e.g., Right of way, 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 are also ineligible:

- Non-applied research. (Note that research focused on understanding population baselines and conservation status of species, and/or research that identifies key opportunities for restoration, enhancement, maintenance, or acquisition is eligible for HCTF funding)
- Training costs for project personnel

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.

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- Law enforcement activities
- Fish rearing, farming, stocking, or hatchery projects
- Wildlife rescue or rehabilitation centres
- Captive breeding and rearing, except for activities or circumstances that will result in clear and positive outcomes for recovery of native species populations
- Feeding of wildlife species with the exception of activities that are part of population recovery projects
- Control of native wildlife
- Salaries for regular Provincial government employees (wages for Auxiliary employees dedicated to the proposed project are eligible)
- Salmon-only projects that do not also benefit provincially managed fish species or their habitats
- Marine projects, except for activities that occur in estuary habitat
- Mapping-only projects. Note that mapping may be a component of a larger, eligible HCTF proposal
- Development or production of curriculum guidebooks or publication materials for fishing and hunting, tour activities
- Hosting or organizing conferences (note that presenting/speaking at conferences may be an eligible activity if it is clearly tied to the management of the species/habitat in your project and it is a cost-effective way to share project results)
- Production or sponsorship of commercial programs
- Stand-alone interpretative materials, signs and services that are not part of a larger, eligible HCTF project
- Creation or management of stand-alone electronic databases, websites, or file systems