



ONTARIO LAND TRUST ASSISTANCE PROGRAM (OLTAP)

Guidelines for Applicants

Submission Deadline: 5:00 pm on Friday, March 17, 2017

**Please read these guidelines carefully as there have been changes.
Incomplete applications will not be processed.**

The *Ontario Land Trust Assistance Program (OLTAP)* aims to advance the protection of biodiversity and contribute to the long-term environmental health and sustainability of Ontario by supporting the acquisition and management of ecologically sensitive lands by eligible recipients.

The current OLTAP funding cycle has a focus on supporting projects that help protect species at risk (SAR). Applications are being accepted in order to consider support for:

- Associated costs of land securement
- Management planning and/or SAR inventory
- Direct management actions to improve SAR habitat or mitigate impacts.

A total of \$73,450 is available to be granted in the current OLTAP funding cycle.

These funds have been made available through support provided by Environment and Climate Change Canada, and represent the second year of a three-year partnership between OLTA and Environment and Climate Change Canada, concluding March 31, 2018.

Applications for OLTAP are due by 5:00 pm on Friday, March 17, 2017.

Please direct any inquiries to admin@olta.ca or call 416-588-6582.

1. Submission

BEFORE completing the OLTAP application, please thoroughly review:

- 1) The OLTAP Guidelines for Applicants
- 2) The OLTA Grant Recipient Agreement template
- 3) The OLTAP Tip Sheet.

Completed applications and all documentation are to be submitted electronically to admin@olta.ca by **5:00 pm on Friday, March 17, 2017**. Please submit your application as a single PDF document file. The maximum file size is 10MB. Larger files may be submitted as multiple smaller files or sent using DropBox or other similar large file transfer software. Please contact the OLTA office if you have any problems or questions.

Please note: It is no longer necessary to submit a completed hard copy of your OLTAP application and/or supporting documentation; however, applicants must be prepared to provide such hard copies if requested.

Late or incomplete submissions will not be considered. Applicants will receive an e-mail within one business day of submission, confirming that their application has been received, and are responsible for contacting OLTA shortly thereafter if they do not receive a confirming e-mail.

2. Applicant Eligibility

To be eligible for OLTAP funding, an applicant must be currently listed as an eligible Ecological Gifts Program recipient by Environment and Climate Change Canada including:

- Members in good standing with OLTA and that have adopted the *Canadian Land Trust Alliance Standards and Practices 2005*; or
- Conservation Authorities and conservation organizations

Note: While membership in OLTA is not a requirement to apply for this year's OLTAP funding, applicants are strongly encouraged to become land trust members or Associates of OLTA if they currently are not. OLTA's ability to develop and sustain programs like OLTAP relies on our demonstrating a strong membership base.

If applicants are requesting funding for a project for which the eligible recipient is partnering with a non-eligible group, the following must accompany the application:

- 1) A partnership agreement between the parties specifying the roles and responsibilities of each organization for the project.
- 2) A letter to OLTA specifying which organization is responsible for the various costs, along with any other relevant information required to evaluate the project. **Note: only costs incurred by the OLTAP eligible recipient will be considered.**

3. Project Eligibility & Evaluation Criteria

For this round of funding, OLTAP will support the following:

- Associated costs of land securement for properties that contain and/or provide habitat for species at risk;
- Costs of developing property management plans (PMPs) for such properties, and/or the costs of conducting species at risk (SAR) inventories on owned properties that contain or have a high probability of supporting species at risk;
- Costs to reimburse direct habitat management actions, as identified in Recovery Strategies and/or Property Management Plans, to improve SAR habitat or mitigate impacts on owned properties only.

(See Section 4 - Eligible Costs).

OLTAP grants will only be provided to eligible recipients that have submitted a project that meets at least one of the following criteria:

- A property with a priority species (see Appendix 1)
- A property in a priority area (see Appendix 1)
- A property with the presence of one or more Schedule 1 SARA federally listed species at risk
- A property with any endangered or threatened species listed under other legislation

Additional evaluation criteria are provided in Appendix 2. Please review carefully.

Please also note: Conservation easement projects are only eligible for OLTAP funding if a Baseline Documentation Report has been completed and is attached to the application. The Baseline Documentation Report must follow the 2006 template prepared by the Ontario Heritage Trust and Ontario Land Trust Alliance.

Applications will be reviewed and assessed by the OLTAP Grant Review Committee, with funding decisions based on the above criteria. The committee includes representatives of the Ontario Land Trust Alliance (OLTA), Environment Canada (EC), Nature Conservancy of Canada (NCC) and Ontario Heritage Trust (OHT). The Committee reserves the right to request clarification and/or additional information from an applicant to aid in consideration of the request.

Please remember that OLTAP is a competitive funding program and that meeting project eligibility does not guarantee that your request will be successful and/or that full funding will be granted.

Your application should make a strong case for why your project should be funded.

4. Eligible Costs

OLTAP will support the reimbursement of:

- A. associated costs of land securement;
- B. costs of developing property management plans and/or conducting SAR inventories;
- C. costs to implement direct management actions.

A. Associated Costs of Land Securement

OLTAP will support transactional costs associated with the purchase and/or donation of lands and conservation easements on a reimbursement basis only for completed securement projects. The following costs are eligible:

- an appraisal
- a survey
- land transfer taxes
- legal fees
- planning approval
- fees associated with facilitating cross border transactions
- staff time and/or consultant time to develop a Baseline Documentation Report (BDR) for a conservation agreement at up to \$350 per day for a maximum of 5 days.

The securement transaction must have completed between August 1, 2016 and the date you submit your application to OLTAP.

B. Property Management Plans and/or Species at Risk Inventories

OLTAP will support costs associated with developing PMPs and/or undertaking SAR Inventories for *fee-simple properties only*. The following costs are eligible:

- costs to develop a PMP that outlines management actions to protect SAR and other significant conservation values of the property (includes staff time/and or consultant time at up to \$350 per day for a maximum of 15 days).
- costs to undertake a SAR Inventory to determine presence of additional species beyond what has already been confirmed (includes staff time and/or consultant time at up to \$350 per day for a maximum of 15 days).

Funding will be provided to reimburse costs already incurred (since August 1, 2016) or planned to be completed no later than December 15, 2017.

C. Direct Management Actions

OLTAP will support the reimbursement of costs incurred to implement direct habitat management actions, as identified in Recovery Strategies and/or Property Management Plans, to improve species at risk (SAR) habitat or to mitigate human impacts. Actions may include but are not limited to habitat enhancements, vegetation plantings, removal of exotics, creation of residences, erection of fencing, relocation of trails, signage etc. Eligible expenses include:

- Equipment
- Fencing
- Supplies
- Vehicle Rental
- Travel (includes mileage at applicant's approved rate not to exceed current Treasury Board Secretariat rates)
- Signage
- Direct staff and/or contractor costs for direct project implementation (maximum rate of \$350/day)

Eligible management implementation costs must have been incurred (since August 1, 2016) or planned to be completed no later than December 15, 2017.

Ineligible Costs include:

- salaries and benefits other than those noted above.
- organizational administration/overhead
- direct land and/or easement purchase costs
- management/stewardship costs not directly related to SAR habitat improvement/impact mitigation.
- annual/routine monitoring costs
- stewardship endowment funds

Unless otherwise determined by the OLTAP Committee, OLTAP grants to any one applicant will not exceed:

- 20% of total grant available; and,
- 15% of the appraised land value per land securement project.

5. Auditing

OLTA reserves the right, on behalf of the OLTA-Environment and Climate Change Canada partnership, to complete an audit of the financial records of OLTAP grant recipients to ensure compliance with the terms and obligations of the grant recipient agreement. When requested, the recipient shall provide and make available to such auditors any records, documents and information that the auditors may require. The scope, coverage and timing of such audits shall be as determined by OLTA. OLTA will inform the recipient of the results of any audit and the recipient will address, or put into place measures to address, as soon as possible after the completion of the audit, any activities which the audit may show to be necessary to be in compliance with the intention of OLTAP.

6. Required Documentation

All documentation must be submitted electronically to admin@olta.ca. Please submit your application as a single PDF document file. The maximum file size is 10MB. Larger files may be submitted as multiple smaller files or sent using DropBox or other similar large file transfer software. Please contact the OLTA office if you have any problems or questions.

For Land Securement Projects:

- The completed application, including the property assessment roll number;
- Copy of transfer/deed of land **and** title abstract, including copy of registered and signed easement if applicable;
- Copy of the letter of transmittal signed by the appraiser, dated, and stating the FMV Appraisal - **Note this is not required for Ecological Gifts;**
- A consolidated and dated invoice (addressed to OLTA on your organization's letterhead) providing itemization of costs to be reimbursed (**Please note: Submit copies of paid individual invoices or cheques stubs as backup to the consolidated invoice**);
- Maps showing the location of the property both regionally and locally;
- Written acknowledgement regarding information/data disclosures:
 - For land/easement donations - confirmation that the donor understands that information regarding the donation will be submitted to OLTAP in a funding request and may be shared with government partners.
 - For all projects - confirmation that the current title holder (either private landowner in the case of conservation agreements or the agency holding title for fee-simple acquisitions) understands that data regarding the property will be

submitted to OLTAP in a funding request and may be shared with government partners;

- Copy of the land selection worksheet for this property (optional);
- Worksheet outlining funds required to steward the property (recommended);
- Where applicable, the following documents should also be included:
 - signed conservation easement agreement **if it is not included in the Baseline Documentation Report**;
 - signed Baseline Documentation Report;
 - signed partnership agreement.

For Property Management Plans and/or Species at Risk Inventories:

- The completed application, including the property assessment roll number;
- Copy of transfer/deed of land **and** title abstract;
- Worksheet outlining funds required to steward the property (recommended);
- Written confirmation acknowledging that data contained in application and resultant products (i.e., PMP and/or SAR Inventory) may be shared with government partners;
- Maps showing the location of the property both regionally and locally.

Where funding is requested for costs already incurred, please also provide:

- A consolidated and dated invoice (addressed to OLTA on your organization's letterhead) itemizing costs to be reimbursed (**Please note:** *Submit copies of paid individual invoices or cheques stubs as backup to the consolidated invoice*);
- Copy of PMP and/or SAR Inventory including information listed in Appendix 3.

Where funding is requested for costs yet to be incurred, please also provide:

- A brief work plan including anticipated activities, dates/timelines (including anticipated date of completion and submission of reports to OLTA) and budget;
- A dated invoice (addressed to OLTA on your organization's letterhead) requesting advance payment of up to 50% of requested funding;
- *Please note you will be required to submit a copy of your completed PMP and/or SAR Inventory including the information listed in Appendix 3 in order to receive the final installment of your approved grant (see Section 8 - Grant Agreement and Payment). (**Please note:** *Submit copies of paid individual invoices or cheques stubs as backup to the final consolidated invoice*).*

For Management Actions:

- The completed application, including the property assessment roll number;
- Copy of transfer/deed of land **and** title abstract;
- Copy of your Property Management Plan that identifies the action(s) undertaken;
- Written confirmation acknowledging that data contained in the application may be shared with government partners;
- Maps showing the location of the property both regionally and locally.

Where funding is requested for costs already incurred, please also provide:

- A consolidated and dated invoice (addressed to OLTA on your organization's letterhead) providing itemization of costs to be reimbursed (**Please note:** *Submit copies of paid individual invoices or cheques stubs as backup to the consolidated invoice*);
- A Management Action Report as outlined in Appendix 4.

7. Notification

OLTA will make every effort to notify applicants in writing about the results of the application process within 60 days of the submission deadline.

8. Grant Agreement and Payment

Successful applicants will be required to sign a Grant Agreement with OLTA, outlining the terms and conditions of the grant acceptance, approved expenditures and related information, before any funds will be released.

Where funding is approved for costs already incurred, OLTA will reimburse costs generally within 30 days provided all conditions are met.

Where funding is approved for costs yet to be incurred, OLTA will provide an advance of up to 50% of approved funding generally within 30 days of receipt of signed Grant Agreement. The remaining grant amount will be provided within 30 days of receipt of the completed PMP and/or SAR Inventory including the information listed in Appendix 3 and/or a Management Action Report as outlined in Appendix 4, and associated final invoice.

9. Recognition and Communications

The successful recipient will give credit to and acknowledge receipt of financial assistance from the Ontario Land Trust Alliance, through OLTAP, in every report, advertisement, brochure, media release, signage, etc. related to the project, as follows:

“The Ontario Land Trust Assistance Program assists eligible recipients with costs associated with land securement and management to help conserve Ontario’s biodiversity. OLTAP is an initiative of the Ontario Land Trust Alliance Inc. This project was undertaken with the financial support of the Government of Canada.”

Recipients will also include the OLTA logo, to be supplied by OLTA, and follow design and usage rules for this logo in every report, advertisement, brochure, media release, signage, etc. where other logos are included.

Recipients will invite OLTA and, at OLTA's request Environment and Climate Change Canada, to participate in any public announcements or ceremonies in regard to the project, and further agree to cooperate with OLTA in any communications OLTA might lead pertaining to achievements realized under OLTAP.

Where feasible, OLTA also requests that grant recipients provide one high-resolution electronic photograph of your property, along with confirmation that OLTA has permission to use the image in print and/or on-line media. Please provide photo credit where required.

Appendix 1

Priority Species and Priority Areas for Species at Risk

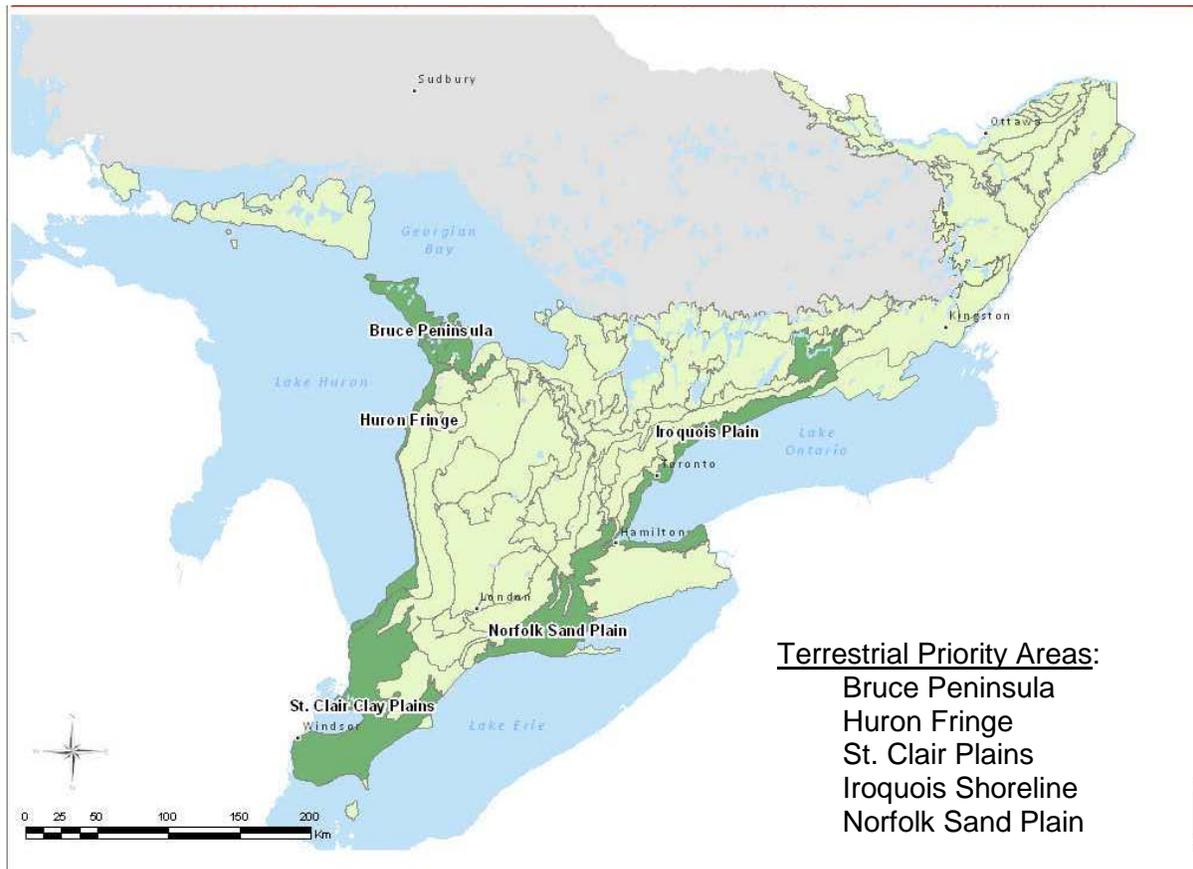
Terrestrial Priority Species:

- Acadian Flycatcher
- Massasauga
- Monarch
- Henslow's Sparrow
- Western Chorus Frog, Great Lakes/St. Lawrence-Canadian Shield Population

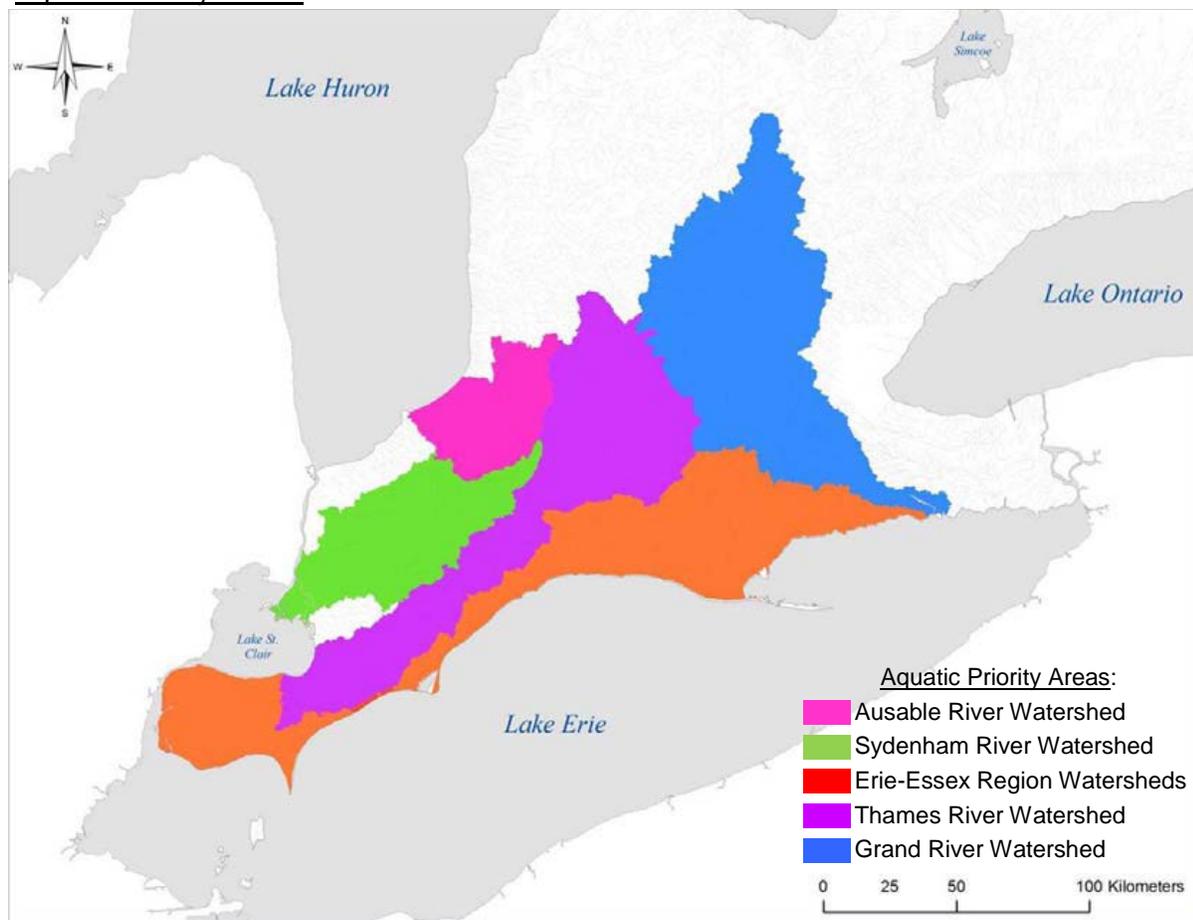
Aquatic Priority Species:

- Channel Darter
- Pugnose Shiner
- Eastern Pondmussel
- Eastern Sand Darter
- Lake Chubsucker

Terrestrial Priority Areas:



Aquatic Priority Areas:



Appendix 2

Additional Evaluation Criteria for Funding Consideration under OLTAP

All Projects (criteria as applicable)

A. Ecological significance (beyond SAR criteria):

- Does the project contain provincially significant features?
- Does the project fall within a core natural area/linkage area identified through a planning or natural heritage mapping exercise?
- Is there strong potential for restoration or habitat enhancement?
- Does the project offer opportunities to buffer or create connections between natural habitats?
- Does the project contain rare or under-represented elements or communities?

B. Context:

- Is the project directly adjacent to existing conservation lands? If it is not adjacent, how far away are the existing conservation lands?
- Is the project large and/or strategic enough to warrant perpetual conservation?
- Are the features actively threatened, or do municipal or provincial policies or ownership provide an effective degree of protection already?

C. Public benefit:

- Will the project provide a clear benefit to the public, such as conservation of natural features, recreation or tourism?
- Is there evidence of community support or opposition to the project that is being secured for conservation purposes?

D. Management needs:

- Is there any evidence of toxic contamination, safety hazards, or other potential liabilities?
- Are there buildings or structures on the property? What will they be used for?
- Will the natural features on the property be largely self-sustaining, or will they require ongoing management intervention?
- Are there existing incompatible uses on the property, or neighbouring land uses that may be incompatible?
- Can the property be realistically and/or practically managed to ensure the conservation of the features for which it was acquired?

E. Financial feasibility:

- Why has this method of securing the property been chosen?
- Have any funds been raised already? What proportion of project costs do the existing committed funds represent?

F. Proponent capacity:

- Does this project fit within a broader strategic plan of the applicant?
- Has the applicant made significant efforts to investigate long-term management issues and requirements for the project?
- Does the applicant have the resources and capacity to ensure the long-term management of the project?

Management Action Projects:

- Is the action(s) being implemented on a property with posted Critical Habitat for any endangered or threatened species at risk listed under the Species at Risk Act?
- Does the action(s) address broad strategies and/or approaches described in the final or proposed Recovery Strategy for the species?
- Is the action(s) identified as a high priority in the corresponding Property Management Plan or addressing a new or urgent threat that has arisen since the PMP was developed?
- Is there a high probability that the action(s) undertaken will have the intended result?
- Does the action address a single species or are there broader or multi-species benefits?
- How will the impact of the action(s) be measured over the short and long-term?
- What plans are there for future monitoring and/or surveys to assess the benefits to SAR?

Conservation Easement Agreement Projects:

Evaluation will include a consideration of whether the agreements:

- identify the conservation values;
- are designed to ensure the protection of those values;
- document the public benefit of entering into the easement;
- contain restrictions that the eligible recipient is capable of monitoring.

Appendix 3

Required Information for Property Management Plans and SAR Inventories

Project management plans (PMP) must follow the *Canadian Land Trust Standards and Practices 2005*. The PMP must also provide the following information:

- Has a recent SAR inventory been conducted? Y/N
- Has a SAR recovery plan/action plan been consulted: Yes or No or n/a
- Specific actions to be taken
- Date of management plan
- Management plan span of time covered
- Other threats identified

SAR inventory must include:

- Date of current inventory
- Date of previous inventory (if any)
- Recommended date to re-examine
- Summary of methods used
- Is there a management plan? Yes or No or Being developed
- SAR inventory details:
 - SAR name
 - COSEWIC status
 - SARO Status
 - Observation Date
 - Species Rank
 - Population Size
 - Population Type (breeding, development, nesting, other)
 - Potential Threats (development, human impact, invasive species, other)
 - Observation Type
 - Observation Notes
 - Occurrence Record provided to Provincial Conservation Data Centre? If yes, provide the name of contact biologist.
 - Occurrence Record provided to EC-CWS or DFO or Parks? If yes, provide the name of contact biologist.

Appendix 4

Required Information for Management Action Report

For each action undertaken, provide the following information:

- General type of action implemented (e.g., residence creation, erection of fencing)
- Brief description of what was done (e.g., erected 5 bird boxes; put up fence to close off trail)
- Result indicators (e.g. for improvements: # hectares improved; For impact mitigation: # of SAR individuals protected, for participation: # person-days)
- Species affected (list all species addressed)

Management Action (indicate general type of action)	Description (include a short description of what was done)	Result Indicator (quantitative measure)	Species Targeted (list all SAR addressed by action)	Volunteer involvement (# of person days)	Paid involvement (# of person days)
Habitat Improvement Actions:					
Vegetation planting		# of hectares improved			
Vegetation and exotic removal		# of hectares improved			
Riparian restoration		# of km improved			
Residence creation		# of residences created			
Other habitat improvement activities (describe)		# of hectares improved (or other relevant metric)			
Human Impact/Threat Mitigation Actions:					
<i>For example:</i> Trail re-alignment Erection of fencing Signage Other mitigation action	<i>Include the identified threat and how it was addressed and/or reduced.</i>	# of SAR animals/individuals # of SAR sites/colonies/populations protected # of SAR species protected overall			

Appendix 5

Helpful References, Resources and Websites

[Important Bird Areas](#)

[COSEWIC](#)

[Federal Species at Risk](#)

[Provincial Species at Risk site](#)

[Land Registry Offices](#)

[Carolinian Canada Big Picture](#)

[Niagara Escarpment Plan](#)

[Oak Ridges Moraine Conservation Plan](#)

[Natural Heritage Information Centre](#)

[Provincial Policy Statement \(2005\)](#)

[Ontario Provincial Planning Act](#)

[Bruce Trail Conservancy](#) – Optimum Trail Route

[UNESCO site](#) – Biosphere Reserve and World Heritage

[RAMSAR Wetlands](#)