



# LAND SECUREMENT STRATEGY

2020 - 2030





# Land Securement Strategy

2020 - 2030



Produced by Orland Conservation, 2020

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# Introduction

The *2020-2030 Nottawasaga Valley Conservation Authority Land Securement Strategy* is an update of the organization's first Land Securement Strategy, produced by Orland Conservation in 2007. This new 10-year strategy sets a direction for the Nottawasaga Valley Conservation Authority (NVCA) to continue its work in long-term protection and conservation of the watershed through land securement.

Since 1960, NVCA has secured 23 ecologically significant sites, totalling 5,240 hectares of mostly environmentally sensitive areas within the watershed. In combination with lands protected by **NVCA's** partner agencies, including Ontario Parks, counties, and land trusts such as the Bruce Trail Conservancy and Oak Ridges Moraine Land Trust, over 60,072 hectares of land are protected within the 370,000-hectare watershed. This translates to a total of 16.23% of land protected in the watershed across all organizations and agencies, both governmental and non-governmental. NVCA lands constitute 1.4% (5,240 hectares) of the 16.23% total land secured in the watershed.

**Watershed Area 370,000 ha**

**Total Secured Land 60,072 ha / 16.23%**

In 2015, Canada adopted a suite of national targets known as the 2020 Biodiversity Goals and Targets for Canada. These 19 targets cover issues ranging from species at risk to sustainable forestry to connecting Canadians to nature. Canada Target 1, which focuses on conservation of terrestrial land and water, states the following goal: **"By 2020, at least 17% of terrestrial areas and inland water, and 10% of marine and coastal areas, are conserved through networks of protected areas and other effective area-based**



**conservation measures.”** Through implementation of this strategy and a Land Securement Program for 2020-2030, NVCA will contribute to the Canada Target 1 goal by increasing land securement in Ontario within the NVCA watershed.

As we begin a new decade in conservation, the NVCA watershed continues to face increasing development pressures. Growth is coming in the form of escalating demands for housing, employment and outdoor recreation, especially in Collingwood, Wasaga Beach, Essa, Innisfil, and encroaching areas from the south such as New Tecumseth. The Bradford-West Gwillimbury area has experienced the most population growth at 25.8%. According to Statistics **Canada’s 2016** census data, Simcoe **County’s** population grew 7.5% from 2011 to 2015, **which was 2.9% greater than Ontario’s** overall rate of population growth. This increasing development pressure makes further **refinement to NVCA’s** land securement initiatives necessary.

The mandate of NVCA under Section 20 of the *Conservation Authorities Act* is **“to establish and undertake, in the area under which it has jurisdiction, a program designed to further the conservation, restoration development and management of natural resources other than gas, oil, coal and minerals”** (R.S.O. 1990, c. C.27, s. 20).

**NVCA’s** new *2020-2025 Strategic Plan* identifies the following vision and mission statements:

#### Vision

A sustainable watershed that is resilient to the effects of climate change, urban growth and other stressors and provides for safe, healthy and prosperous people and communities

#### Mission

Working together to deliver innovative, integrated watershed management that is responsive to the environmental, economic and social sustainability of the Nottawasaga Valley watershed

The strategic plan also **identifies an objective to** “Promote resiliency and capacity in the face of dynamic conditions within the watershed,” outlining six priorities, of which, the following three priorities pertain to land securement:

- Identify and seek partnership opportunities to actively manage and restore natural systems to mitigate the effects of urban development, agricultural intensification and a changing climate.
- Encourage and support strategic land acquisition to increase landscape connectivity.
- Partner with watershed stakeholders to update natural hazard and natural heritage mapping.

**This Land Securement Strategy furthers NVCA’s mission and primary objectives** through the securement of interests in land for long-term conservation, thereby protecting ecological lands and flood hazard areas from potential future development. Where possible, the rehabilitation and restoration of land that has, or is, experiencing degradation may be implemented by NVCA and other partners. Further, working with farmers and the Ontario Farmland Trust can help bridge the preservation of both ecologically significant and prime agricultural lands.

Through the implementation of this strategy, NVCA can move towards an achievable goal of securing more ecologically significant lands in the watershed. Early and quick success should be shared with local and regional governments and communities in order to communicate **NVCA’s role in the watershed** as a leader in environmental protection.

Since the adoption of the previous Land Securement Strategy in 2007, several reliable government funding sources emerged for conservation authorities to obtain significant land securement funds; however, early in the following decade most of those programs ended. Despite the reduction in funding support, NVCA, with support from partners, managed to secure almost 632 additional hectares since 2007 without implementing a landowner outreach program.

Guided by this Land Securement Strategy, future securement of ecological lands by NVCA will be achieved through fee simple donations first (full value or split-receipt), followed by important purchases. Conservation easements will generally not be considered, but are discussed in this report in the unlikely event that NVCA opts to pursue an easement project in the future.

## Regional Context

**Situated just north of the Greater Golden Horseshoe, NVCA's watershed** features a range of towns and cities, productive agricultural land, pristine wetlands, the Niagara Escarpment, abundant trails and world renowned beaches. At approximately 3,700 km<sup>2</sup>, the NVCA watershed is one of the larger conservation authority jurisdictions in Ontario.

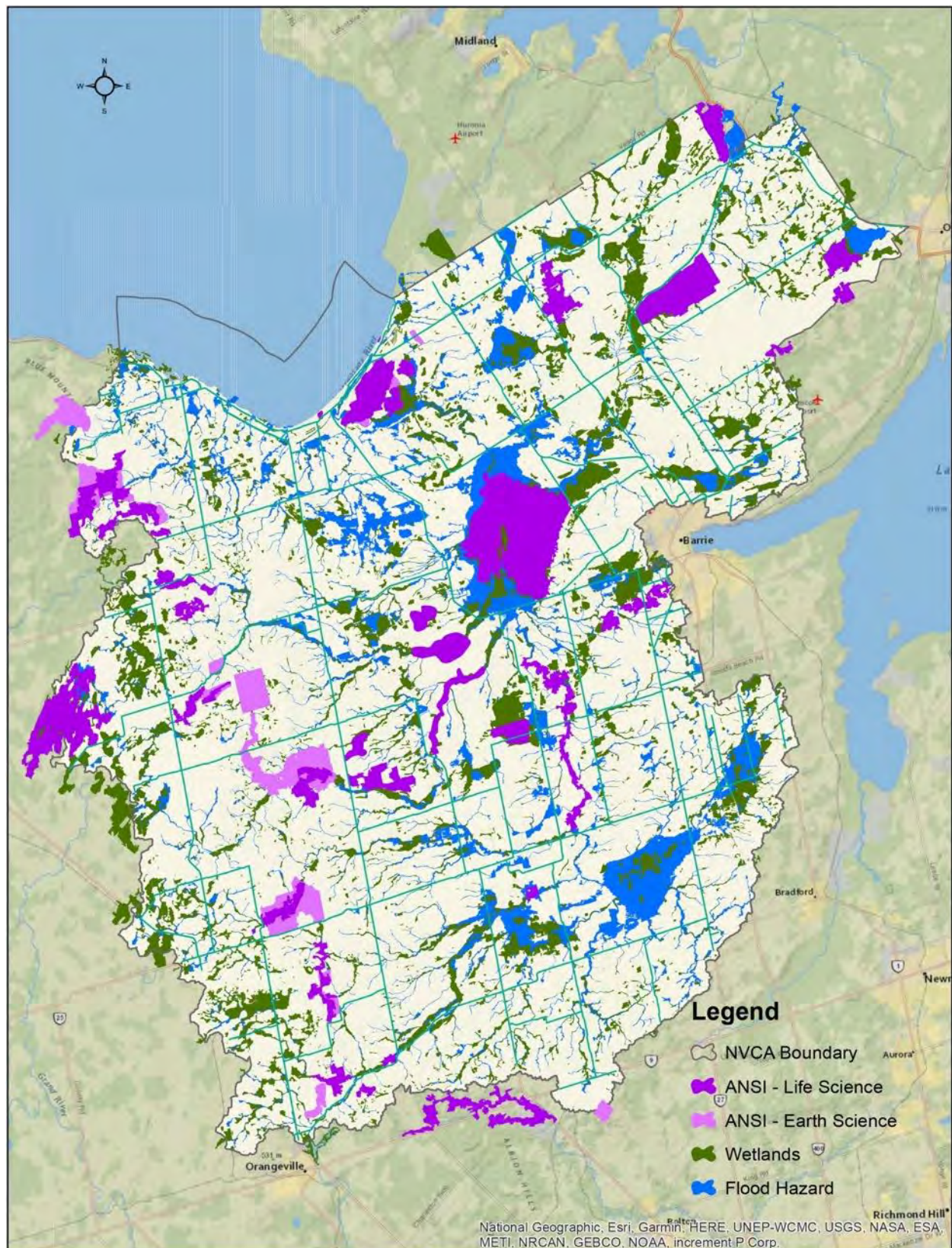
The watershed drains northward in Georgian Bay and is composed of 18 municipalities within the counties of Simcoe (74%), Dufferin (22%), and Grey (4%). **The northern boundary of NVCA's jurisdiction is Nottawasaga Bay.** To the south, the watershed is bound by the Humber and Credit River watersheds. The Niagara Escarpment forms part of the western boundary, separating the Nottawasaga from the Grand and Saugeen watersheds. Finally, the east boundary of **NVCA's watershed** features numerous streams which drain into Lake Simcoe.

## Natural Features

**NVCA's watershed contains significant portions of the Niagara Escarpment and** a relatively small area of the Oak Ridges Moraine, as well as the Oro Moraine, Provincially Significant Wetlands (PSWs), Environmentally Significant Areas (ESAs), Earth Science and Life Science Areas of Scientific Interest (ES-ANSIs and LS-ANSIs), and flood hazard areas.

NVCA has mapped components of its Natural Heritage System within its jurisdiction illustrated in Figure 1. Natural features and ecological significance provide a baseline when determining where to focus land securement effort.

**Figure 1: Map of NVCA Natural Feature Occurrences**





## Neighbouring Conservation Authorities

The NVCA watershed is bordered by six other conservation authorities shown in Figure 2 and listed below. When identifying which lands in the watershed to **acquire, it is helpful to examine NVCA's land securement initiatives in relation** to these neighbouring conservation authorities and consider adjoining lands secured outside the watershed.

### Neighbouring Conservation Authorities

- Credit Valley Conservation (CVC)
- Grand River Conservation Authority (GRCA)
- Grey Sauble Conservation Authority (GSCA)
- Lake Simcoe Region Conservation Authority (LSRCA)
- Saugeen Valley Conservation Authority (SVCA)
- Toronto and Region Conservation Authority (TRCA)

Figure 2: Map of Neighbouring Conservation Authorities



Conservation Ontario, 2015

As summarized in the introduction, since 1960, NVCA has secured 23 ecologically significant sites, totalling 5,240 hectares of mostly environmentally sensitive areas within the watershed. The table below lists total lands secured by NVCA and the six neighbouring conservation authorities, as well as the total percentage each conservation authority has secured of their respective watersheds. The neighbouring conservation authorities have secured a greater percentage of their watersheds, ranging from 1.9% (SVCA) to 5.2% (TRCA); whereas as of the date of this strategy, NVCA has secured 1.4% of its 370,000-hectare watershed (5,240 hectares).

Table 1: Neighbouring Conservation Authority Land Holdings

Conservation Authority	Ha of Land Owned/Managed	Ha of Watershed	% of Land Owned Compared to Status of Land Acquisition Activities	Land Securement Strategy	Targets	
Grand River CA	19,400	680,000	2.8%	Passive	Acquisition Policy 2003	None
SVCA	8,599	463,327	1.9%	Passive	Acquisition checklist	
NVCA	5,240	370,000	1.4%	On hold with update of strategy	On hold with update of strategy	
TRCA	18,100	346,700	5.2%	Active	Greenlands Acquisition Project for 2011 – 2015	200 ha / year for 5 years
LSRCA	5,992	340,000	1.7%	Medium	2019 - 2025	250-300ha by end of 2025
GSCA	11,734	314,600	3.7%	Passive	Currently updating	High eco-service value
CVC	2,873	100,000	2.9%	Active	Greenlands Securement Strategy	Creation in progress

This 10-year strategy aims to substantially increase **NVCA's total conservation** land holdings by 500 to 700 hectares by 2030 with a more proactive course of land securement activity. The rationale for these minimum and maximum land securement targets are discussed later on in this report in the Goals for Land Securement section. This growth would increase **NVCA's** stake in the 16.23% percent of total land secured within the watershed, from the current relatively low percentage of 1.4%. Acquiring 500 to 700 hectares by 2030 may not significantly **elevate NVCA's position** in the above table, since other **CA's are presumably still securing land over the same time period, but** not achieving this target would result in a noticeable lack of land securement growth.

The goal of securing an additional 500 to 700 hectares by 2030 can be achieved provided the recommendations of this strategy are implemented upon approval of NVCA's board of directors. In the longer term, as momentum builds and with efficient use of resources, NVCA has the potential to far exceed its current land holdings.

## NVCA Land Holdings

**NVCA's land acquisition efforts focus on lands that have been deemed significant by local, provincial or international agencies, and have demonstrated abilities that offer protection to both ground and surface waters as well as significant flora/fauna habitat.**

Since 1960, NVCA has secured 23 ecologically significant sites, totalling 5,240 hectares of mostly environmentally sensitive areas within the watershed. In combination with lands protected by **NVCA's partner agencies, including** Ontario Parks, counties, and land trusts such as the Bruce Trail Conservancy, Nature Conservancy of Canada, and Oak Ridges Moraine Land Trust, over 60,072 hectares of land are protected within the 370,000-hectare watershed. This translates to a total of 16.23% of land protected in the watershed across all organizations and agencies, both governmental and non-governmental. NVCA lands constitute 1.4% (5,240 hectares) of the 16.23% total land secured in the watershed.

NVCA currently owns 23 sites for a total of 5,240 hectares of land, of which 19 are within Simcoe County (4,874 hectares); two are in Grey County (331 hectares); and two are located in Dufferin County (35 hectares) as shown in Table 2. These lands include areas for flood control, wetlands, managed woodlots, day use parks, passive recreation and outdoor education, and undeveloped natural and environmentally significant areas. Collectively, conservation areas, provincial parks, and crown lands constitute the most significant public holdings of natural heritage areas and features across southern Ontario. Now with more land trusts forming over the last few decades, there is increased opportunity for partnership and collaborative efforts to secure and steward lands.



To assist with the management of NVCA's properties, two distinct property classifications have been identified based on management needs:

1. Conservation Areas
2. Natural Areas

## Conservation Areas

Conservation areas, owned and managed by conservation authorities, were established to conserve important watershed resources such as floodplains, valley lands, wetlands, forest regeneration areas, and water management structures. NVCA conservation areas were mainly acquired for their environmental significance.

Conservation Areas are owned and/or managed by NVCA that are generally a larger property with significant conservation value such as Minesing Wetlands and Nottawasaga Bluffs conservation areas. These lands have higher levels of public access and may have assets and infrastructure in place to support passive recreation (hiking, birdwatching).

The management of conservation areas will be to provide access to recreational opportunities while still maintaining and enhancing the ecological values of the properties. They generally have signage, trail maps and are promoted for use. Conservation areas will have either a master plan or management plan in place. Conservation areas may generate revenue.

## Natural Areas

Natural Areas are lands owned and/or managed by NVCA that are generally smaller than conservation areas and have significant conservation values. These lands have lower public use and minimal assets or features that support these uses.

The management of natural areas is to maintain and enhance the natural ecosystems on the property. Natural areas will have management plans or managed forest plans in place where sensitive species or areas will be identified.

Trails, if present, will be minimally managed by signage and recreational activities will be limited to passive activities. Trail promotion will be absent or minimal and it is anticipated that use will be highly localized. These areas may have limited signage and recreational management will be minimal, addressing risk management needs primarily.

As listed in Table 2 below, NVCA has 11 conservation areas, and 12 other natural areas and landholdings in the watershed. Note that Elba Wetlands is not included in the table because it is owned by OHT. Publicly-accessible conservation lands are important to many watershed residents as they provide opportunities for recreation, education, and environmental conservation and protection. These conservation lands also provide important habitat for many diverse ecosystems. In some cases, the habitat protects federally recognized species at risk.

**Table 2: NVCA Land Holdings**

Property Name	County	Municipality	Hectares
Conservation Areas			
Edenvale	Simcoe	Springwater	5.7
Fort Willow	Simcoe	Springwater	3.6
Glencarin	Simcoe	Adjala Tosorontio	2.7
Minesing Wetlands	Simcoe	Springwater/Clearview	4308

Property Name	County	Municipality	Hectares
New Lowell	Simcoe	Clearview	59.9
Nottawasaga Bluffs	Simcoe	Clearview	145
Osprey Wetlands	Grey	Grey Highlands	287
Petun	Grey	Blue Mountains	44.3
Tiffin	Simcoe	Essa	78.4
Tottenham	Simcoe	Tecumseth	54.4
Utopia	Simcoe	Essa	42.9
			5031.9
Other Land Holdings			
AWT	Simcoe	Essa	2
Black Ash Creek	Simcoe	Collingwood	11.8
Boyne Valley Springs	Dufferin	Mulmur	31.9
Dunsmore Natural Area	Simcoe	Oro-Medonte	46.4
Mason	Dufferin	Mono	3.3
Moss Conservation Holding	Simcoe	Oro-Medonte	6.1
Pretty River	Simcoe	Collingwood	11.7
Ravines of Matheson	Simcoe	Springwater	17.4
Riverdale Park	Simcoe	New Tecumseth	7.3
Saunders	Simcoe	New Tecumseth	29.5
Wagner	Simcoe	Springwater	40.2
Willow Creek Gauge Site	Simcoe	Springwater	0.5
			208.1

Property Name	County	Municipality	Hectares
		Total NVCA Land Holdings	5,240

## Protected Land within the Watershed

Including NVCA-owned lands and conservation agreements, provincial parks, Simcoe, Dufferin and Grey county forests, and land trust secured properties, there are almost 60,072 hectares of protected lands within NVCA watershed. The total watershed has an area of 370,000 hectares, therefore the percentage of protected lands in the watershed is 16.23% as shown in Table 3 below and illustrated in Figure 3.

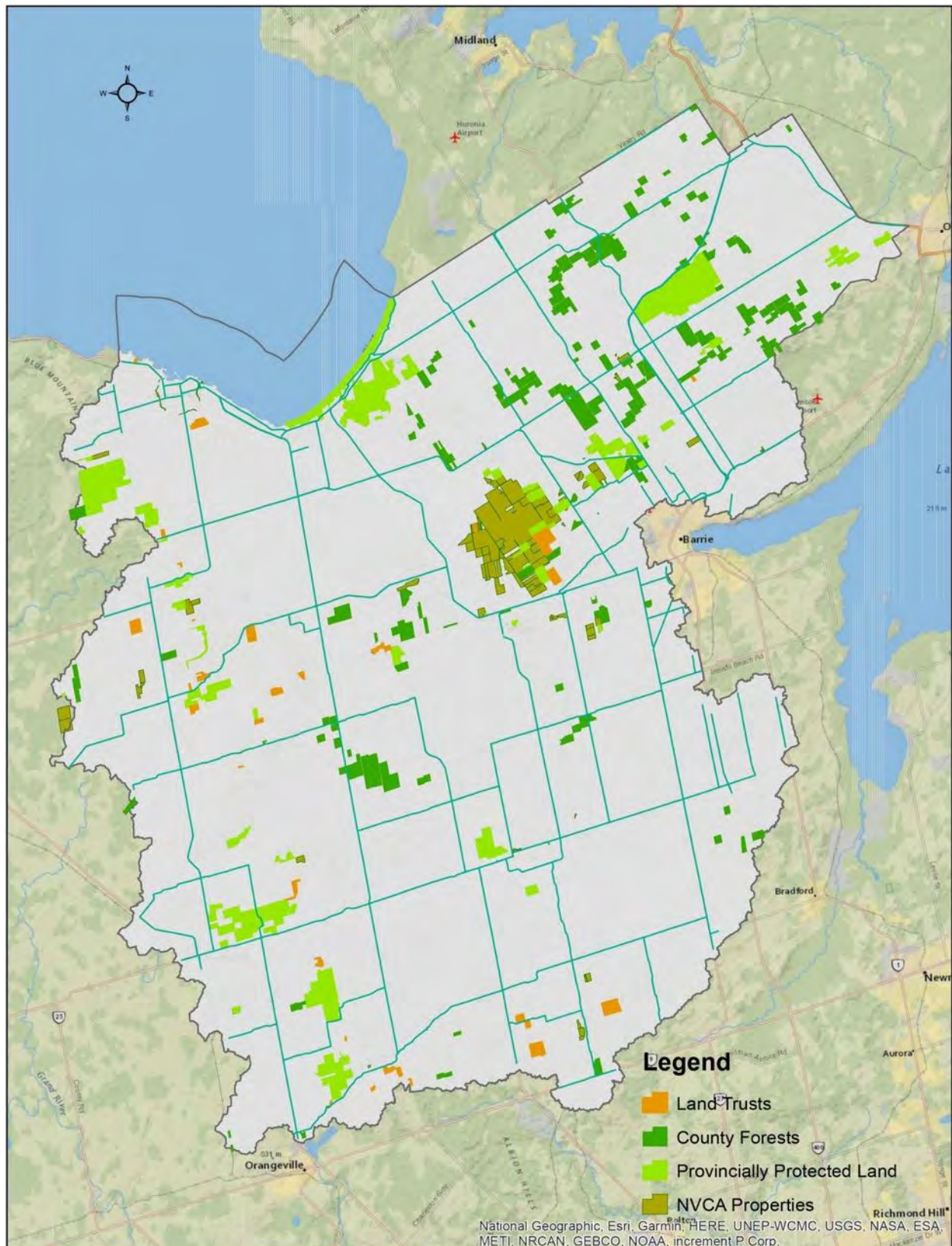
**Table 3: NVCA Watershed Total Protected Land by Organization**

Organization	Hectares	% of Watershed
Simcoe County	33,492.11	9.051
Ontario Parks & related	18,630.17	5.035
NVCA	5,240.03	1.416
Dufferin County	988.27	0.267
Grey County	527.63	0.142
Ontario Heritage Trust	278.50	0.075
Oak Ridges Moraine Land Trust	243.82	0.065
Bruce Trail Conservancy	222.17	0.060
Escarpment Biosphere Conservancy	201.53	0.054
Ontario Farmland Trust	130.31	0.035

Nature Conservancy of Canada	82.56	0.022
Huronian Land Conservancy	17.40	0.004
Ducks Unlimited Canada	9.71	0.002
Couchiching Conservancy	7.69	0.002
Blue Mountain Watershed Trust	0	0.00
Georgian Bay Land Trust	0	0.00
Ontario Nature	0	0.00
TOTAL	60,071.91 hectares	16.23%



Figure 3: Map of Protected Lands in NVCA Watershed



## Provincial Parks & Park Lands

Provincial parks, and other park lands, are managed for the public by public agencies such as municipalities and the Ontario Ministry of the Environment, Conservation and Parks (**MECP**) through **Ontario Parks**. In NVCA's jurisdiction, these lands include numerous county forests and 11 provincial parks. The provincial parks account for marginally more than NVCA-owned conservation lands at over 5,400 hectares of protected land, which include:

- Bass Lake Provincial Park
- Beattie Pinery Provincial Nature Reserve
- Boyne Valley Provincial Park
- **Devil's Glen Provincial Park**
- Earl Rowe Provincial Park
- Hockley Valley Provincial Park
- Noisy River Provincial Park
- Nottawasaga Lookout Nature Reserve
- Pine River Provincial Fishing Area
- Pretty River Provincial Park
- Springwater Provincial Park
- Mono Cliffs Provincial Park
- Mud Lake Provincial Park
- Wasaga Beach Provincial Park

## Regulated Land

**"Regulated land"** is a term Ontario Parks uses to describe lands regulated under the *Provincial Parks and Conservation Reserves Act* (PPCRA). Lands regulated under the PPCRA may include private land, shore line areas, and even beds of lakes. Most lands encompassed by a provincial park boundary

are regulated; however, some areas adjacent to, or nearby, a park are crown lands that have been acquired by the province to later be formally added to the boundary of that park. These lands are not regulated under the PPCRA, which means Ontario Parks cannot apply PPCRA legislation within these areas; rather, the acquired lands are under the jurisdiction of the *Public Lands Act* (and managed by MNRF). There are examples around Boyne Valley, Pretty River Valley and Hockley Valley provincial parks.

## Crown Land

Crown land in Ontario is mostly managed by MECP. About 77% of the **province's land mass is made up of crown land managed under the *Public Lands Act***, with an additional 10% of crown land held as provincial parks and conservation reserves.

**One significant piece of crown land in NVCA's jurisdiction is Copeland Forest**, an area of 3,467 hectares. Although separate from Ontario Parks but operated by MECP, it is counted in the total lands secured by Ontario Parks shown in Table 3 for simplicity.

## Patent Land

In addition to provincial parks and regulated lands, the province also manages some lands not under the jurisdiction of the PPCRA or the *Public Lands Act*. **These "patent" lands** are typically former crown lands that have been transferred into private ownership through a patent and identified by defined boundaries and a Property Identification Number (PIN). **Landowners' private residences sit on patent land. In NVCA's watershed area, the vast majority of lands are patent, including some provincial park parcels.**

## County & Agreement Forests

There are agreements between municipalities, counties, and the province to manage woodlands for fibre production, forest regeneration, and woodland conservation. These lands would not generally qualify under the term land securement. However, of all the real estate assets owned by the three counties **in NVCA's watershed, county forests are the most likely to remain as forests** because of the aforementioned agreements. Thus, this strategy will consider county forests as secured lands.

By a substantial margin, the Simcoe County holds the most secured land in the watershed at almost 33,500 hectares. Simcoe County land acquisition program is financially self-sustaining by timber harvesting through utilization of good forestry practices. The sale of timber funds additional land acquisitions.

## Land Trust Secured Land

Eleven **land trusts operate within NVCA's watershed. Some are more active** than others and some have specific areas of focus within the watershed. Combined, these land trusts have currently secured 897.79 hectares of land in the watershed.

### Land Trusts in NVCA Watershed

- Blue Mountain Watershed Trust (BMWT)
- Bruce Trail Conservancy (BTC)
- Couchiching Conservancy (CC)
- Ducks Unlimited Canada (DUC)
- Escarpment Biosphere Conservancy (EBC)
- Georgian Bay Land Trust (GBLT)
- Nature Conservancy of Canada (NCC)

- Oak Ridges Moraine Land Trust (ORMLT)
- Ontario Farmland Trust (OFT)
- Huronia Land Conservancy (HLC)
- Ontario Nature (ON)

## Land Securement Partners

It is common to have several partners involved in the securement of a particular property. Sometimes additional partners are needed for funding purposes or assistance is sought for specific expertise (i.e. negotiating leverage) needed to secure a property. In other cases, involving title or an interest in title, a partner group may be a better suited recipient than the original group involved. There may be a better-suited recipient of the land because of property taxes, funding requirements or because the landowner has requested the involvement of another group due to personal preference. These circumstances will depend on the unique characteristics of the property, the type of securement method involved and the requests of the landowner (depending on whether it's a **donation or purchase**). It is important to note that any partnership involvement that NVCA has in the securement of a property within its watershed should be viewed as a securement success. This **is also referred to as an 'assist.'** An assist can include the involvement of NVCA's staff time, resources, technical expertise or funding towards securement of a particular property. Even if NVCA does not end up holding title, an interest in title, or even managing a particular property, any contribution by NVCA should be recognized by NVCA board and staff. After all, the end goal is to secure these key properties and protect them in perpetuity by whatever means possible.



The following sections describe the various land securement partners and their primary benefits to NVCA, as well as their strengths and weaknesses in terms of holding title or interests in title (i.e. conservation easement agreements) to land. A more detailed discussion about funding partners is provided further in this report under Program Funding.

## Federal Government

The federal government has provided significant land securement funding to the Nature Conservancy of Canada and Ducks Unlimited Canada, and has allowed other land trusts to access these funds. While this funding was not extended to conservation authorities; such funds can be made indirectly available to conservation authorities for land securement by partnering with land trusts.

### Partnership Potential & Benefits

- Financial support is limited to land trusts, but indirect financial support is possible by partnering with land trusts
- National focus and support through 2020 Biodiversity Goals and Canada Target 1 goal of protecting at least 17% of terrestrial areas and inland water
- **Programs linked with tax advantages (Environment Canada's Ecological Gifts Program)**

## Provincial Government

The Province of Ontario has not been a financial contributor to land securement for several years and there is no intention of reviving the former Greenlands Securement Program delivered through the Ontario Heritage Trust. Note that at the time of writing this report, Ontario Parks is not

entertaining land acquisition, even if donated; however, they have offered to provide technical assistance.

#### Partnership Potential & Benefits

- Technical support and access to natural heritage data for the province.

### Upper-Tier Municipal Government

**All three counties in NVCA's watershed, Simcoe, Dufferin and Grey, have county forests and have expressed an interest to expand.**

Simcoe County has been active in purchasing lands to include as county forests. Revenue is generated from timber harvesting using good forestry management practices and gets applied to acquiring additional forest lands. Thus, taking title and managing timber is of importance to the county.

Dufferin County is working on a Municipal Comprehensive Review that will consider details of land acquisitions. They are prepared to work with NVCA on a case-by-case basis.

Grey County is not looking to purchase lands at the time of writing this report but stated that they would receive land donations to add to county forests.

#### Partnership Potential & Benefits

- Possible financial support
- Ability to hold land
- Provide mapping and natural and cultural heritage data

## Lower-Tier Municipal Government

Local municipalities were not approached for the development of this strategy. It would be prudent to follow-up with each municipality when approving target areas identified later in this report to assess local support. Generally, local municipalities may be mainly interested in municipal parks protection.

### Partnership Potential & Benefits

- Possible financial support
- Ability to hold land
- Stewardship
- Provide mapping and natural and cultural heritage data

## Land Trusts

Eleven land trusts secure natural heritage lands to protect significant ecological features in the watershed. Land trusts are non-government charitable organizations. The geographical areas of focus for the seven land trusts that have, to date, secured land in the watershed are illustrated in Figure 4. It is important to work with these organizations to avoid duplication of effort and to ensure all natural heritage lands in the watershed are provided with the maximum sustainable protection. NVCA staff should develop and expand on partnerships with these and other organizations involved in holding title to, or providing funding for, the acquisition of ecologically sensitive and significant lands.

Some of the smaller land trusts have minimal staffing and capacity. However, they may be able to contribute volunteer time towards landowner outreach, fundraising in their community for a securement project, and stewardship.

Some funders may insist on a land trust being primary holder of the property. This emphasizes the need for NVCA to work with them on projects of mutual interest. Agreements can be made such that NVCA receive the property should the land trust ever fold or want to dispose of the asset. Regardless, the land will be secured and should be counted as an NVCA success.

### Partnership Potential & Benefits

- Ability to hold land
- Stewardship and natural heritage
- Access to federal funding programs
- Local fundraising and networks

American Friends of Canadian Conservation (AFCC) is available to help NVCA with land securement involving American landowners. AFCC can receive donated land temporarily from landowners and issue them a U.S. tax receipt. Land is later transferred to NVCA.

Blue Mountain Watershed Trust (BMWT) does not currently hold any land and is not actively securing lands but is active in partnering with other organizations to assist with land securement in the Blue Mountains area. BMWT is open to partnering with NVCA and could possibly assist in landowner outreach **and fundraising for projects. Within NVCA's watershed, the land trust's primary area of focus is the Silver Creek Wetland Complex.**

Bruce Trail Conservancy (BTC) has been one of the most active of all the land trusts in the watershed. However, it only focuses land securement activity along its designated Optimum Route (OR) for the passive-use hiking trail which generally follows the crest of the Niagara Escarpment. BTC is effective at fundraising and acts quickly on securement projects. BTC commonly partners with conservation authorities to secure and steward land along its OR.

Couchiching Conservancy (CC) **has identified two areas within NVCA's** watershed that it would like to see secured. Firstly, CC would like to have a corridor secured from Minesing Wetlands to Matchedash Bay. Secondly, Bass Lake West in Oro-Medonte is the other area of importance to secure. CC has been increasing acquisitions and its capacity over the years. The land trust is open to partnering with NVCA in those target areas.

Escarpment Biosphere Conservancy (EBC) primarily focuses on securing lands on the Niagara Escarpment and is highly active in their securement activity. EBC also executes securement projects relatively quickly and would be a potential securement partner both on and off the Escarpment.

Huronian Land Conservancy (HLC) focuses in the northern reaches of the watershed as **far south as Minesing Wetlands. HLC's primary** focus is on lands with ecological and cultural significance within the Huronia region. HLC is a small, volunteer-led land trust with limited resources, but could be a potential partner should opportunities arise for partnership development.

Georgian Bay Land Trust (GBLT) is a very active and relatively successful land trust but has not secured land within **NVCA's watershed to date. GBLT's** securement activity has been located north, along the east coast of the Matchedash Bay. GBLT has expressed a willingness to work with NVCA on securement projects of mutual interest should they arise.

Nature Conservancy of Canada (NCC) has been a partner to NVCA for decades with a primary focus in Minesing Wetlands. The area remains their focus in the watershed and future collaborations are expected to continue. NCC currently has access to significant federal funds for securement.

Ducks Unlimited Canada (DUC) is currently focused on coastal areas of the Great Lakes but would consider helping NVCA with some ideal areas. **Securement projects worthy of DUC's consideration must be ideal for** waterfowl staging or breeding habitat (e.g. shallow, open water) and have a minimum project size of 100 acres (40 hectares). DUC does not have a leveraging demand; therefore, it could potentially fund an entire project. DUC also has access to federal land securement funds.

Ontario Farmland Trust (OFT) aims to secure prime agricultural land. They have only secured land through donations of conservation easements thus far. These easements have been certified as ecogifts through the Ecological Gifts Program, which required that they hold significant ecological merit. Partnering on securement projects that have prime agricultural land may suit having OFT as a partner as they can arrange to keep the arable land working and manage it.

Ontario Nature has acted as a land trust across the province; but not in NVCA's watershed, and land securement is not this ENGO's primary role. If a property has a particularly important ecological feature or function, Ontario Nature may consider helping to securing it.

Oak Ridges Moraine Land Trust (ORMLT) has been very active in securing lands across the moraine. Through its Natural Heritage Strategy, it has identified two target areas within the south part of NVCA watershed. ORMLT has also been working with Couchiching Conservancy and Huronia Land Conservancy to fill in the current void of a land trust covering areas between their geographic boundaries. Therefore, they are a viable securement partner for projects in those areas of the watershed too.

## Other Non-Governmental Organizations

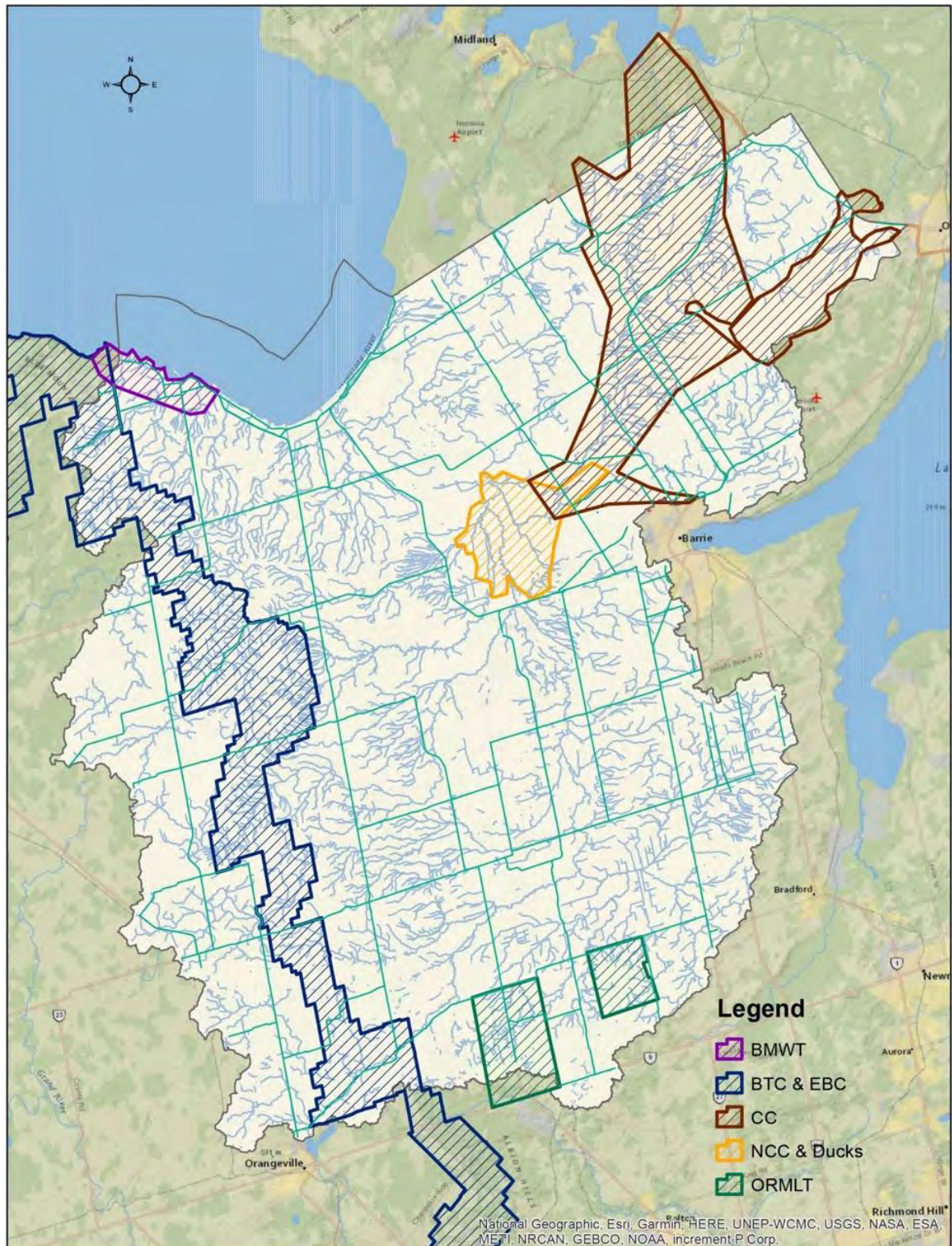
Other non-governmental organizations include Friends of Minesing Wetlands and Nature Barrie. These partners provide land stewardship and land management support. These groups may also be willing to partner on fundraising and community support efforts for protection of an area of specific public interest.

### Partnership Potential & Benefits

- Land management
- Stewardship and natural heritage
- Local fundraising and community support
- Assist with ecological inventories



Figure 4: Map of Land Trust Areas of Interest in NVCA Watershed



# Forms of Land Securement

There are two primary ways that conservation authorities protect environmentally significant lands; holding title (fee simple) or holding rights on the land (conservation easement agreements). The following provides a brief overview of these securement tools.

## Fee-Simple Purchase

The most commonly used method of land securement is fee-simple purchase. In this case, NVCA would purchase full title and rights to a property from a willing seller.

In accordance with the soon to be released NVCA Policy Guidelines for Achieving Ecological Net Gains, funds received by NVCA through cash-in-lieu offsetting payments may be directed to the acquisition of the following:

- Acquisition of ecologically-significant land: Acquisition of lands containing significant natural features as outlined in this Land Securement Strategy for the purpose of long-term conservation and stewardship of such features, with emphasis on those that abut or are within proximity to existing NVCA landholdings.

Other lands acquisition: Acquisition of lands with demonstrable potential to host future feature creation projects. Lands should ideally be located strategically to ensure that future restoration will provide landscape-level benefits (e.g. corridor connectivity, expanding areas of existing natural cover).

## Conservation Easement Agreement

Conservation easements will generally not be considered by NVCA, but are discussed here in the unlikely event that NVCA opts to pursue an easement project in the future.

Conservation easement agreements, are an effective tool for protecting the conservation values of a property because they contain negative or restrictive covenants. Conservation easement agreements are legally binding agreements registered on title, whereby the landowner transfers specific rights, such as the ability to create building lots or cut trees, to an easement holder such as a conservation authority. Depending on how the agreement is set-up, the easement holder usually has the right and responsibility to monitor **the property (thus the term "easement") and ensure that the** terms of the conservation agreement are being respected. If no easement is granted under **the agreement, the agreement can be referred to as simply a "restrictive covenant."**

The goal is usually to prevent the destruction of a feature on a particular property. The rights to the uses of a property (i.e. subdivision rights, development rights, tree cutting rights) can be donated or purchased from the landowner; however it is more common to have conservation easements donated. Conservation easements can provide for the protection of a feature, trail construction, and construction and maintenance of rehabilitation works.

One of the starting points when establishing a strong conservation agreement program is creation of a legally robust template to negotiate from. The restrictions, or negative covenants, in the document are listed as examples of the type of covenants monitored and enforced by the easement holder but are not meant to be inclusive. In general, there are no published guidelines on the correct wording for conservation easement covenants. Conservation organizations and legal advisors have debated the various ways that some

covenants could be interpreted, as well as the ability for a conservation organization to properly monitor and enforce such restrictions.

For the above complexities, NVCA may wish to favour the fee-simple method. There is more control and certainty of land ownership. There are likely less long-term stewardship costs when owning land versus monitoring and enforcing a conservation easement. However, NVCA may wish to consider a conservation easement over holding title in the following situations:

- **When the landowner won't consider any other securement option;**
- When the configuration of the property relative to the location of improvements does not make for an easy direct conveyance of the parcel to be conserved; and
- When NVCA cannot obtain approval for property tax exemption.

# Methods of Land Securement

The following outlines the various methods which could be employed in the securement of environmentally sensitive or significant lands. These options should be clearly communicated to landowners in person, and through web-based media and print publications facilitated through the landowner outreach program discussed later in this strategy. In order to maximize available resources, both financial and in consideration of staffing, this strategy recommends fee simple donations first (full value or split-receipt), followed by important purchases.

## Donations

NVCA encourages donations of land or property rights (i.e. fee simple or conservation easement agreements). These gifts, at appraised value, may qualify as charitable donations under the *Federal Income Tax Act* through the Ecological Gifts (Ecogifts) Program which is administered by the federal Environment and Climate Change Canada (ECCC). NVCA, in pursuing donations of land or property rights, will work with municipalities and environmental organizations, as well as other potential funding partners, in order to secure environmentally significant/sensitive lands.

The Canada Revenue Agency (CRA) provides tax incentives to landowners willing to donate ecologically sensitive lands. All Ecogifts are subject to 0% capital gains tax. All lands donated outside of this program remain subject to 50% capital gains. In addition, as part of the Ecogifts Program, all appraisals are reviewed by an expert panel of appraisers, therefore landowners and NVCA can be assured that the appraisal is legitimate. These and other advantages of the Ecological Gifts Program are outlined in Appendix 1.



Donations can include receipt of lands under specific conditions such as a bequest or gratuitous dedication:

### Bequest

Landowners may elect to provide for a gift to NVCA in their will – perhaps a gift of property. The advantage of making a bequest is that there is no cost **during the landowner’s lifetime**. A bequest can be cost-effective from a tax perspective against the estate and create a legacy for the donor and their family.

### Gratuitous Dedication

Typically, Official Plans contain a provision which requires the dedication of environmentally protected lands to a public authority as part of the development process. Implemented through the conditions of draft approval for the subdivision, these lands are generally those associated with a riverine system, riverine valley system, and include the hazard lands associated with that system and the associated access allowances. Further, environmentally protected lands may contain a wetland feature and its associated buffer.

NVCA may consider accepting the transfer of lands that remain from a development proposal. These lands must be eligible for the Conservation Land Tax Incentive Program (CLTIP), the Managed Forest Tax Incentive Program (MFTIP) or the transfer of lands will not be accepted without an endowment to pay for the property taxes until such a time where the property becomes eligible for CLTIP/MFTIP.

Should NVCA be the public authority to which these lands are dedicated, they shall be dedicated free and clear of all encumbrances and an easement(s) for access to these lands may be required. The donor of the property may also



be required to pay a stewardship fee, to cover for costs associated with the long term maintenance of the lands, which may include such things as:

- Land management planning
- Research and monitoring
- Land operations
- Land administration

The industry standard for a stewardship endowment fund is 15% of the purchase price; however, stewardship costs should be determined on a case-by-case basis following a site visit and discussion with the landowner. In some cases where there could be encroachment and hazard issues, the estimate may be higher than 15%. For properties that require little maintenance or do not allow public access, a lower estimate may suffice.

The exact figure of the stewardship fee shall be calculated based on the actual costs associated with the property and based on expenditure requirements for an agreed upon timeframe. The stewardship fee will be paid to NVCA in a lump sum payment upon the transfer of lands. The cost of the stewardship may range between \$1,200-\$7,000/hectare/year.

## Trade Lands

Trade lands are similar to donations where a landowner wishes to either donate or bequeath their property to NVCA. However, in these instances the property does not contain any significant environmental features. Where NVCA accepts these donations, these properties would be sold with the proceeds being directed into land securement of ecologically significant lands, or other program areas, as agreed upon with the donor. It is recommended that NVCA develop a trade lands policy. Lands disposed of by NVCA will follow the Land Disposition Policy outlined further in this report.

## Direct Conveyance or Partial Taking

A direct conveyance, also called a partial taking, is an acquisition of part of a property by a conservation authority through either a fee simple purchase or donation scenario. For example, if a landowner has a residence they may be willing to dispose of the majority of the property while retaining the residence and amenity area (Figure 5). The advantage of this method is that usually the part of the property severed for conservation purposes does not include the bulk of the value of the property. Therefore, landowners can retain a residential lot and acreage around their residence or building, allowing them **to hold on to the majority of the property's value**. The land severed is then **owned and managed by NVCA (or its partners)**. The landowner's residence or building remains adjacent to the now publicly-owned conservation lands, without the burden of the costs and liability associated with maintaining and managing large property. In addition, if the landowner wishes to sell the property in the future, there is a much more saleable parcel size to sell, which will in turn attract more buyers. Lastly, the landowner could retain some use of the severed property through a Life Interest Agreement. In this case, they could continue to use the severed portion for agreed-upon activities, such as hiking, for a specified term. Life interest agreements are discussed in greater detail in the next section.

It is recommended that NVCA submit a proposal to the MECP based on this Land Securement Strategy and the areas outlined as priority areas for land securement. Once approved by MECP, it would permit the direct conveyance of lands containing environmentally significant features, such as wetlands, by NVCA, as permitted under Section 50 (3)(e) of the *Planning Act* and Section 24 of the *Conservation Authorities Act*. This would expedite the conveyance by by-passing the municipal severance process. However, note that it is prudent to discuss individual cases with municipal planning staff to ensure the land donor/seller will not be left with a non-complying lot.

Figure 5: Direct Conveyance Example



## Split Receipt

A split receipt can be viewed as either a donation of land, or easement, with cash consideration back to the donor, or a purchase of land with a donation of land value in cash, back to the purchaser. Once the land value is determined by a qualified appraiser, the percentage of the fair market value of the land to be donated versus the percentage of land to be accepted in cash will be negotiated. Through the Ecogifts Program, the donated portion must be a minimum of 20% of the value to qualify for a split receipt. Conversely, the landowner cannot receive more than 80% cash for the appraised value.

## Fee-Simple Purchase

The most commonly used method of land securement is fee-simple purchase. In this case, NVCA would purchase full title and rights to a property from a willing seller.

There are two agreement types that could be utilized in a fee simple purchase:

1. Option to Purchase
2. Right of First Refusal

### Option to Purchase

An option to purchase is a contract that would allow NVCA to buy a property at a set price for a stipulated period of time. It is a written contract by the landowner to sell the property by which they agree to not withdraw the offer of sale during the stipulated period of time. The NVCA may pay a fee for this option. This mechanism is often used by a conservation group as a means of **“buying time” in its attempts to acquire a specific piece of land and** allows time to fundraise for the purchase costs.

### Right of First Refusal

A right of first refusal is an agreement between a landowner and the potential buyer to match any third party offer to buy the subject property. It sets out the conditions of sale and is registered on title to the property. It is an interim measure, giving NVCA the option acquire a key property in the future. It can be a good tool to use if negotiations have been halted, e.g., unacceptable appraised value. The Right of First Refusal can also be registered on title, allowing NVCA to buy a property that has an existing conservation easement agreement. In this case, NVCA would prefer to wait until they can secure title rather than be the easement holder. Right of first refusal is also a means by which to discourage other potential buyers (perhaps developers) as they will

know they have competition and the holder of the first rights has priority. There may be a fee associated with the right of first refusal.

## Life Interest Agreement or Lease Back Arrangement

When the vendor/donor wishes to retain an interest in the property, they can enter into either a life interest agreement or a lease back arrangement. A life interest agreement allows the landowner to retain an interest in the property for the duration of their life. This interest can take many forms, including use of a family home or cottage, or recreational access to hiking trails. In a lease back arrangement, the landowner sells the property, but remains in possession for a specified period of time while paying rent to the buyer, effectively making the landowner a tenant. In either case, the land can be donated, purchased or split-receipted. The value of the retained interest would be determined by a qualified appraiser. The agreement would specify a set term or continue as long as the vendor uses the subject property as outlined in the agreement. Such retained interests can range from passive use (e.g. hiking), medium use (e.g. camping, removal of deadfall trees for firewood), to high use (e.g. residing, agricultural operation).

## Exchanges

Landowners who own property within a valley system, flood plain or environmentally sensitive feature may exchange their parcels of surplus tableland owned by NVCA. These arrangements may bring funds to NVCA which can be used to acquire additional conservation lands. While these transactions traditionally consist of the exchange of fee simple interests, they can consist of any combination of property interests. Note that land exchanges are not necessarily acre for acre, any exchange would be based on appraised value as valley lands would not be valued the same as developable tableland.

## Municipal Lands

NVCA may acquire property interests in municipal lands, free or at a nominal cost, when they are located within the boundaries of approved NVCA acquisition projects.

Of all the land securement scenarios, a project often combines several tools. For example, a landowner may decide to donate the bulk of their property via direct conveyance while retaining a life interest on it.

## Land Securement Criteria

To be efficient with limited resources, a set of land securement criteria will dictate and prioritize which lands NVCA should pursue and which lands to accept when a landowner offers to donate.

The two broadest categories are financial considerations and fulfillment of the conservation mandate. Financial considerations takes into account getting the funding for securing the property as well as ongoing stewardship costs. Fulfillment of the conservation mandate includes lands with potential for restoration.

## Financial Considerations

Land donations are preferred, of course, to eliminate the need to raise funds for purchase, but there are still soft securement costs (e.g. appraisal, survey, legal) and stewardship costs in accepting donated land. Strategic purchases should be considered when significant program funds will likely be available for the project and/or when a high-profile property would suit launching a fundraising campaign.



Funding and securement partners will be essential to leverage property acquisitions. Securement partners, such as a small land trust, may have access to program funding that NVCA is not privy to. Also, local land trusts may be able to assist in fundraising towards the securement of the project. Thus, if the property is within an area of interest to a partner, it is given higher priority.

For lands where full title to a property is acquired, the Conservation Land Tax Incentive Program will allow NVCA owned properties to significantly reduce or eliminate the tax burden associated with the long-term management costs associated with the property. Based on the CLTIP criteria (Appendix 2), it can be obvious which properties will be eligible for the program. For example, a property which is located under a provincially designated area (e.g. Niagara Escarpment Protection) will be sure to qualify. For properties in areas that meet other CLTIP criteria (e.g. lands designated protection in municipal Official Plans), it might not be so obvious and final approval is dependent on MNRF approval. When in doubt, NVCA will request a pre-determination from the MNRF for tax exemption for any lands that they are considering taking ownership to. This will require NVCA to submit supporting documentation to the MNRF on a case-by-case basis. These scenarios are categorized as **“subject to certification”** in Table 4 below. For timing purposes, this request would have to be done far in advance, as responses can take months to receive. Nonetheless, this is the only way to have absolute prior knowledge for budgeting purposes about whether property taxes will be exempt or not.

In addition to verifying if a property is CLTIP exempt, the property needs to be assessed for other probable stewardship issues that would increase staff time and costs. Properties abutting existing NVCA lands minimize such stewardship costs since there is negligible extra time and cost for monitoring and maintenance.

## Furthering the Conservation Mandate

The most ideal lands for bettering conservation in the watershed have mostly been scientifically evaluated. The province and NVCA have done most of that assessment through designating ANSIs, wetlands, ESAs, floodplains, habitat of species at risk, etc. Another way to look at it is through the lens of the Ecogifts and CLTIP program criteria regardless if a securement project is to be donated or purchased. The criteria of both of these government programs are **thorough enough to set NVCA's** land securement criteria. Fulfillment of the conservation mandate also includes securement of lands with potential for restoration.

**Table 4: NVCA Land Securement Criteria**

### Priority Areas

Criteria	Tax Exempt CLTIP	Meets Ecogifts Requirement
Provincially Significant Wetlands	Yes	Yes
Areas of Natural and Scientific Interest (Earth Science - Provincial)	Yes	Yes
Areas of Natural and Scientific Interest (Life Science - Provincial)	Yes	Yes
Habitat of Endangered Species ( <i>Ontario Endangered Species Act</i> )	Yes	Yes

## Community Conservation Lands

Criteria	Tax Exempt CLTIP	Meets Ecogifts Requirement
Natural Heritage Features or Areas identified in the Provincial Policy Statement (PPS).	Yes	If appropriately designated in municipal Official Plans and Zoning By-laws.
Regionally Significant ANSI's.	Yes	Yes
Habitats of species of special concern designated by MNRF (species at risk).	Yes	Yes
NHIC species occurrences or ecological communities (S1, S2, S3)	Yes	Yes
Designated Natural Core, Natural Linkage or Countryside in the ORMCP	Yes	Yes
Designated Escarpment Natural or Escarpment Protection in the Niagara Escarpment Plan	Yes	Yes

Criteria	Tax Exempt CLTIP	Meets Ecogifts Requirement
Natural heritage areas identified within a regional/ watershed plan or strategy by CA under the CAA (e.g. Simcoe County Greenlands)	Yes	Yes
Lands designated environmental protection or equivalent in municipal Official Plans. (NVCA, ESA's)	Yes	Yes
Areas within or adjacent to protected areas (i.e., provincial park) that contribute to the natural heritage objectives of the protected area.	Yes	Yes
Other criteria as may apply under the CLTIP program requirements.	Subject to Certification	Yes
Lands adjacent to existing NVCA holdings	Subject to Certification	Yes
Previously identified NVCA property acquisitions	Subject to Certification	Yes

## Secondary Priority Areas

<b>Criteria</b>	<b>Tax Exempt CLTIP</b>	<b>Meets Ecogifts Requirement</b>
Georgian Bay Waterfront	Subject to Certification	Subject to Certification
Bruce Trail Optimum Route and Trail Corridor	Subject to Certification	Subject to Certification
Wetlands (Not of Provincial Significance)	Subject to Certification	Yes
Significant water bodies, rivers, streams, shorelines and valleys	Subject to Certification	Yes (PPS)
Groundwater recharge and discharge areas	Subject to Certification	Yes
Significant wildlife or fish habitats	Subject to Certification	Subject to Certification
Regional Flood Plain (flood and erosion risk)	Subject to Certification	No
Significant Woodlands	Subject to Certification	Yes (PPS)
Natural buffers adjacent to lands that contribute to other ecologically sensitive lands	Subject to Certification	Yes
Connections/Corridors/Features identified by Natural Heritage Programs or Watershed Plans that contribute to conservation or biodiversity	Subject to Certification	Yes

Criteria	Tax Exempt CLTIP	Meets Ecogifts Requirement
Lands under Forest Management Plans (designated areas of concern for biodiversity)	Subject to Certification	Yes

## Parcel Size

After meeting the broad criteria of financial considerations and fulfillment of the conservation mandate, there are more things to consider when drilling down in decision making. Size, in particular, is one of the most important of the primary criteria since the time and costs that are required to secure a property are largely independent of size. Therefore, securing large properties **further advances NVCA's conservation efforts**. For property targeting purposes, the minimum size is 20 hectares.

Potential properties may come along that fall below the minimum size (e.g. landowner offers to donate 10 hectares) but there may be good reasons to secure the property. For example, the property may provide an important linkage between two other secured properties, there may be endangered flora on the site, or it may provide a better access to an already secured property.

Regardless of previously noted criteria, NVCA may decide not to pursue acquisition of a parcel based on factors that may include significant stewardship needs (e.g., motorized vehicle access) or if it is an isolated parcel ("island of green").



# Land Securement Goal & Target Setting

How much land is enough? Securing more land is too loose of an objective. To be effective, NVCA should establish a defensible and achievable land securement goal. This section will outline the criteria for determining target lands and identify which of those lands to prioritize for greatest efficiency.

## Natural Heritage Criteria to Identify Target Areas

Even with a donation-focused securement program, accepting land donations is dependent on the availability of dedicated staff time and funding. Donations **should also meet NVCA's land** securement criteria.

In the *Nottawasaga Valley Conservation Authority Business Plan 2006-2008*, the Conservation Lands Program has identified that land acquisition focuses on lands that have been deemed significant by local, provincial or international agencies, as well as NVCA, and have demonstrated abilities that offer protection to ground and surface waters as well as significant flora and/or fauna habitat.

The upcoming 2020 NVCA business plan (to be released) will include more provisions for recreation, including development and implementation of an organizational recreational opportunity review. This recreation review will: use the asset of conservation lands to foster an appreciation of the watershed; continue to acquire lands with conservation and recreational value as per this Land Securement Strategy; work with partners to develop recreational/educational/stewardship opportunities at conservation areas; and, target one conservation area annually for investigation and enhancement.

The significant environmental features identified in NVCA's watershed (as previously shown in Figure 1), specifically, Provincially Significant Wetlands

(PSWs) and Areas of Natural and Scientific Interest (ANSI) are part of the natural heritage analysis. NVCA is currently conducting wetland evaluations within the watershed, which will be provided to MNRF to update their GIS data. This information should be used for strategic land acquisition planning when it becomes available.

Significant environmental features – PSWs and ANSIs – were used as a foundation for determining high priority areas for securement focus. This is **considered a “coarse” approach to determining** sub-target areas as it does not involve interpretation of orthoimagery.

A preliminary analysis of existing natural features within the watershed and already protected areas was performed using available data. From the analysis, target areas were identified and evaluated based on the following 3 main criteria:

### Sub Target Criteria

1. Areas of provincial & NVCA significance (i.e. ANSI, PSW, floodplain)
2. Areas with funding opportunities and partnerships;
3. Areas where many lots are greater than 20 ha;

In addition to the natural feature data, three other primary criteria were used to establish land securement target areas:

### Primary Criteria

1. Areas with existing secured lands;
2. Areas with funding opportunities and partnerships; and
3. Areas where the average parcel fabric is a minimum of 20 ha.

### Primary Criteria 1: Areas with Existing Secured Lands

These already established conservation areas are excellent core sites to expand upon, especially NVCA-owned lands. The community is most likely very aware and connected to these conservation lands and because they are already in permanent protection, adjacent lands can be secured to increase core habitat or to provide linkages to other protected areas. Furthermore, acquiring new lands adjacent or close to existing NVCA holdings minimizes stewardship costs.

### Primary Criteria 2: Areas with Funding Opportunities & Partnerships

It is much easier to protect land and garner support (both socially and financially) from the community where stakeholders, such as landowners, the municipality, and local businesses, are conservation-minded and appreciate the need for conserving local ecologically sensitive lands. There are numerous **areas within NVCA's watershed where funding opportunities and partners for land securement** have been established. It is best to start with these areas in order to achieve early successes, which can then be used to demonstrate that more support is needed in other parts of the watershed. Such areas may be equally as important in terms of conservation, but may lack funding and partnership opportunities. It is also easier to fundraise when leveraged funds are already committed by a partner(s).

### Primary Criteria 3: Areas where the Average Parcel Fabric is a Minimum of 20 ha

The costs associated with securing ecologically sensitive lands (e.g. staff time, appraisal, survey, legal costs) can be substantial and are not always directly correlated with land area. Therefore, it is more cost-effective to secure as much land as possible in a given transaction and that is why larger parcels will be targeted first. Some properties have relatively large rural residential areas,

which may not be part of the lands to be acquired, therefore a minimum lot size of 20 hectares is used as a benchmark for landowner outreach. Properties with smaller land area may also be targeted for landowner outreach, especially if they have a significant feature, add to existing protected areas, or act as corridors or linkages.

## Secondary Criteria – Property Specific

Secondary criteria apply a fine-filter analysis looking at each property individually. Focusing more on the properties within a defined target area, factors that could be considered at a property-specific level include:

- Areas where development pressure and urgency of securement is high;
- Areas where the cost of land is relatively inexpensive;
- The shape of the property and how it contributes to existing protected **areas, in order to minimize the 'edge effect'**;
- **The viability of the site's species and features, given existing conditions** and practical stewardship actions (or possible restoration);
- The compatibility of the property with the current and potential future surrounding uses (i.e., with conservation of the site is there potential for major change in the landscape due to urbanization agriculture, forestry or other causes);
- The existing or potential ecological connections between the property and other natural areas; and
- The potential of acquiring other lands that may add to the viability of the site.

## Analysis Results: Target Areas for Securement

Following a GIS analysis using the aforementioned criteria, a further drilling down to the following zones are recommended for aggressive securement focus, beginning with a landowner outreach campaign:

### Primary Target Areas

1. Minesing Wetlands
2. Minesing to Wagner Property Corridor
3. Osprey Wetlands to Nottawasaga Bluffs

Secondary Areas were chosen should any of the following occur: landowner outreach in the primary target areas becomes saturated; other securement partners wish to enter a partnership with NVCA, or, if landowners initiate contact with NVCA:

### Secondary Target Areas

- Niagara Escarpment Natural and Protection Area designations
- Minesing to Bass Lake Corridor
- Silver Creek Wetland Complex
- Tottenham to ORMLT securement connections
- Georgian Bay Waterfront
- Expansion of every other NVCA property
- New Areas within ecologically significant (ANSI, PSW) areas not currently close to existing NVCA holdings and containing properties of large parcel sizes (e.g. 40 hectares or more)

Within the 10-year timeframe of this strategy, we recommend that the three Primary Target Areas be given highest priority for landowner outreach. These zones are identified in Figures 6 to 8 below.

It is recommended that for a finer analysis, each property in the Primary Target Areas be evaluated on a case by case basis against these additional factors of consideration:

- The shape of the property and how it contributes to existing protected **areas, in order to minimize the 'edge effect'**;
- The viability of the sites species and features, given existing conditions and practical stewardship actions (or possible restoration);
- The compatibility of the property with the current and potential future surrounding uses (i.e., with conservation of the site is there potential for major change in the landscape due to urbanization agriculture, forestry or other causes);
- The existing or potential ecological connections between the property and other natural areas; and
- The potential of acquiring other lands that may add to the viability of the site.

Should there be time remaining before the strategy is due for renewal in 2030, another target zone should be chosen for landowner outreach using judgement based mostly on funding and partnership opportunities.

Figure 6: Map of Minesing Wetlands

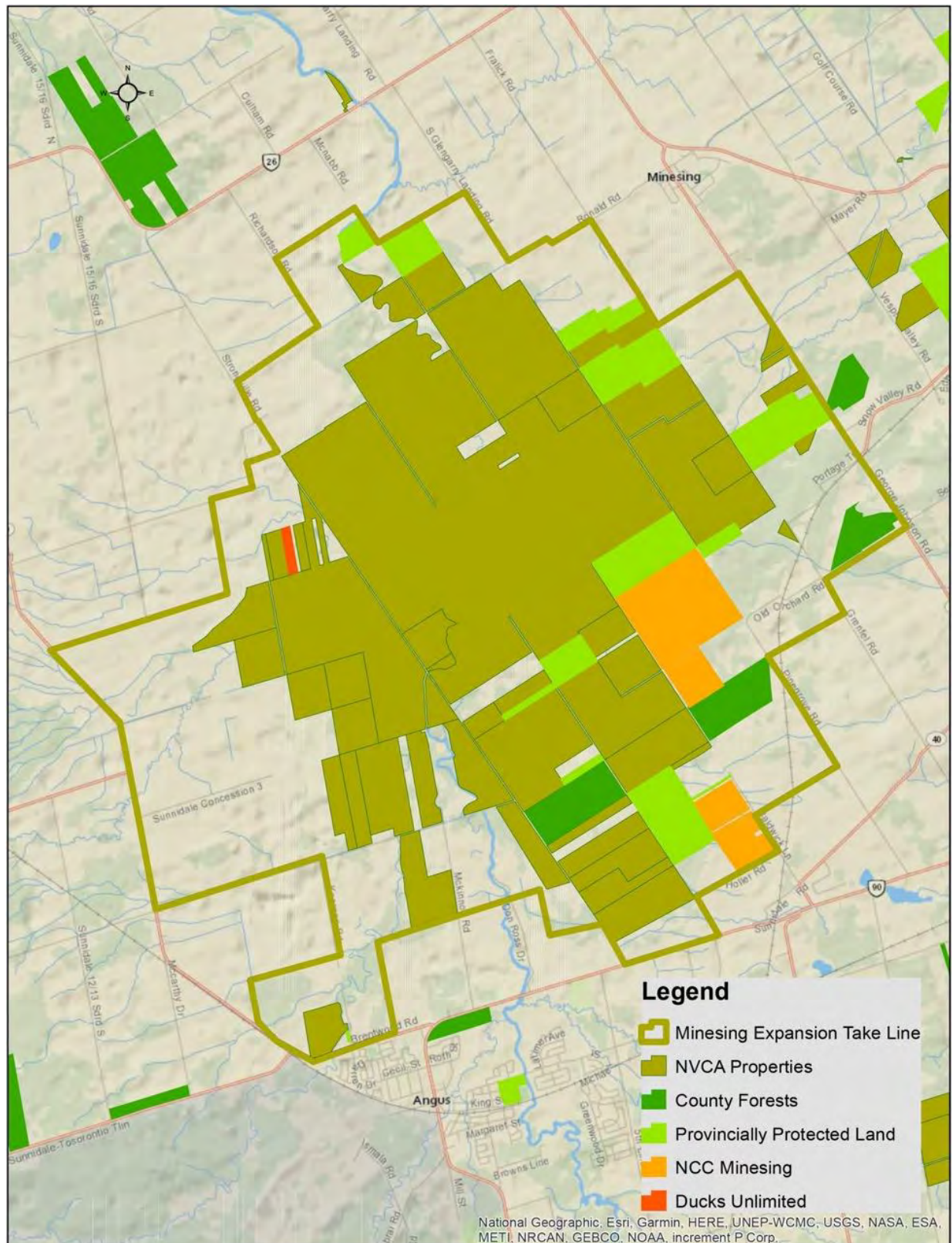




Figure 7: Map of Minesing Wetlands to Wagner Corridor

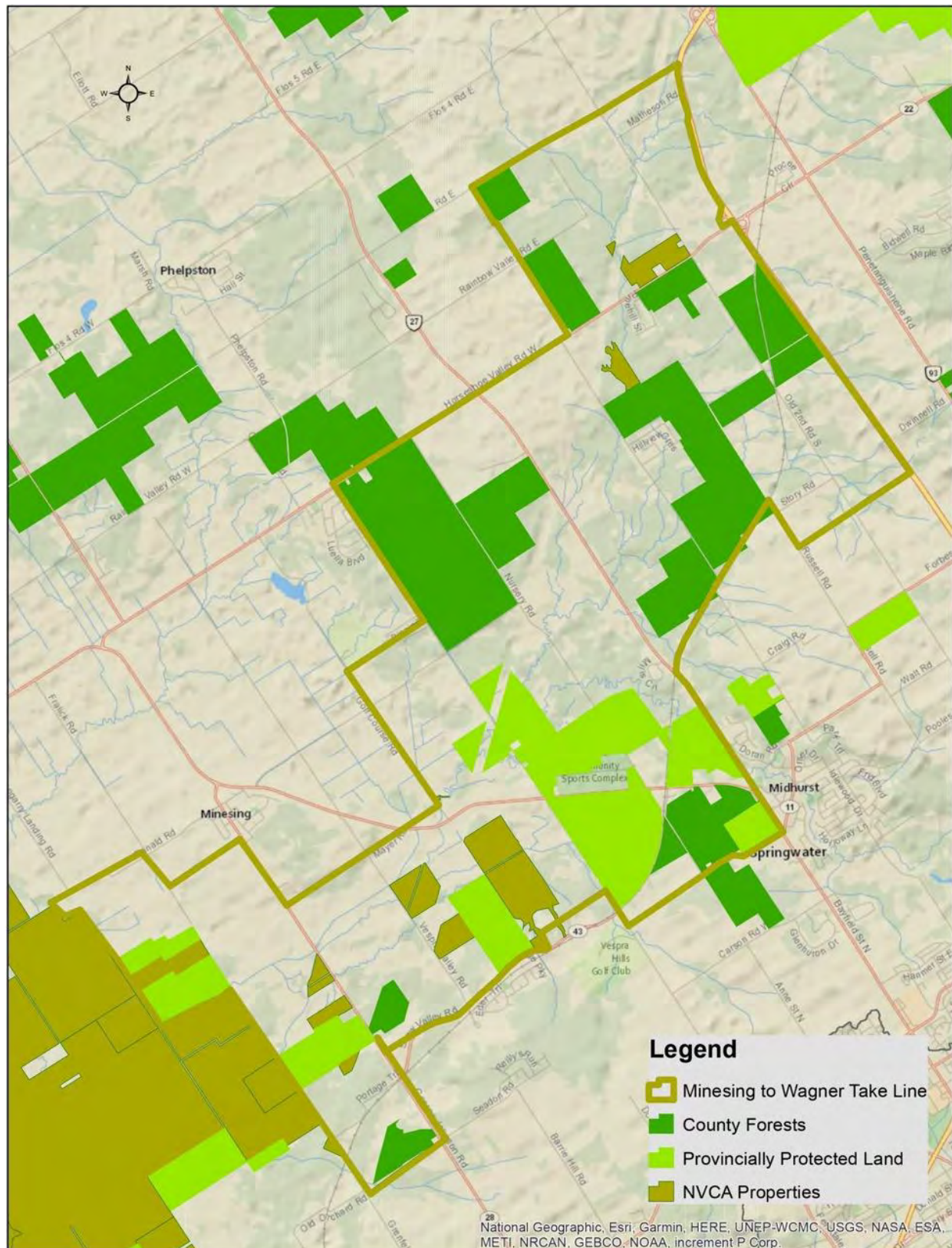
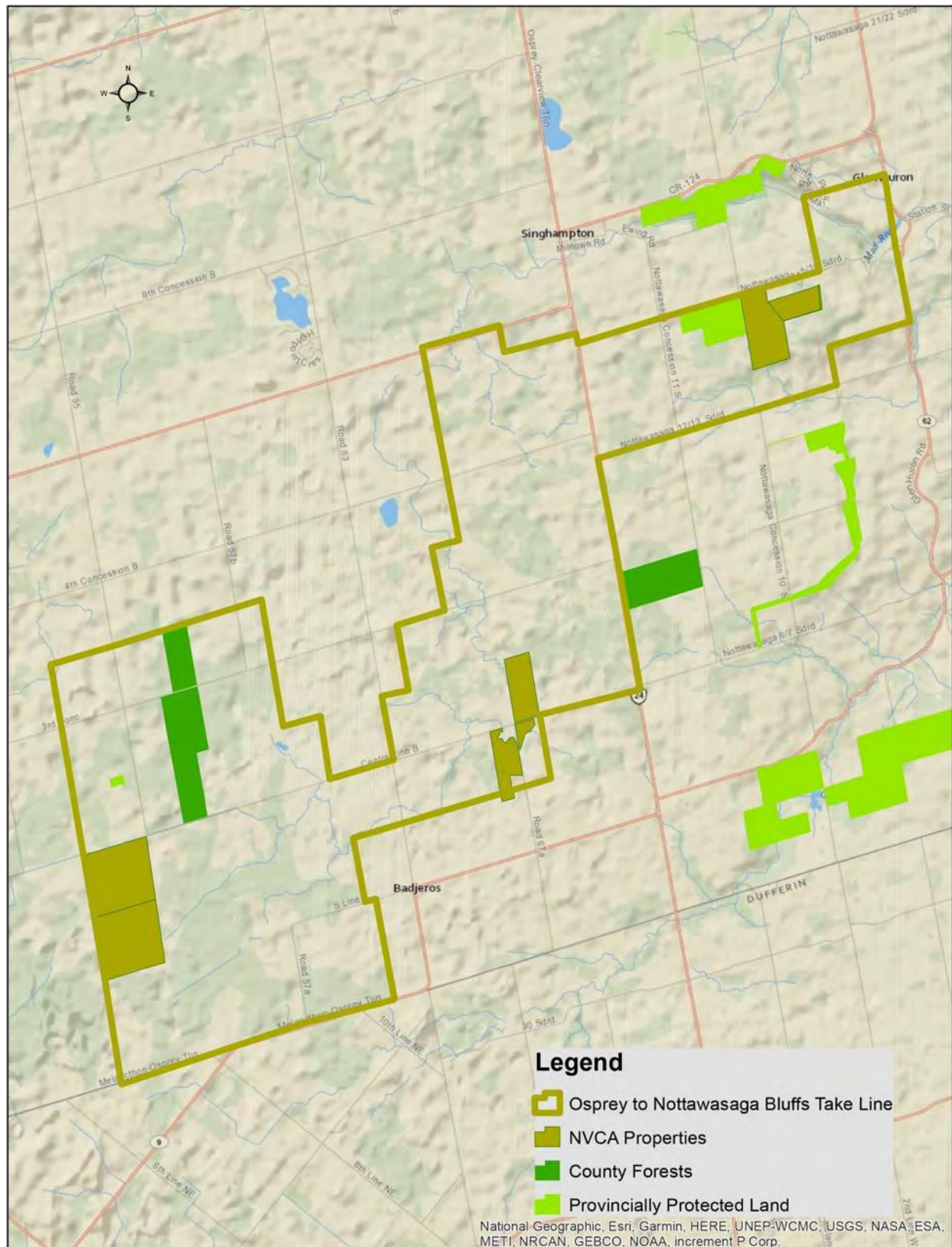




Figure 8: Map of Osprey Wetlands to Nottawasaga Bluffs



## Goals for Land Securement

The Land Securement Strategy defines desirable outcomes and establishes the rationale for the initiative. It provides a context and driver for specific actions. Establishing targets provides the strategy with direction and identifies the required resources for fulfilment. In turn, resources can dictate **implementation of the strategy, but often resources don't present themselves** until a strategy is adopted and individual projects form as a result of implementation. Once a successful project concludes, targets set out in the strategy become achievable and momentum is created. Success then breeds more success.

At one end of the spectrum, with only the allocation of a budget to support a portion of staff or contractor time to undertake the securement process, this strategy could be implemented relying solely on the acceptance of land and conservation easement donations, and externally funded purchases. Donations would be accepted in areas identified in the strategy and if competing donations were presented, staff time would be prioritized towards donations that best meet the criteria and considerations. This would still achieve the objectives of the strategy, but at a slower pace.

Conversely, at the other end of this spectrum, NVCA could dedicate a significant, year-over-year budget towards land securement, targeting willing sellers, and approaching proactive landowners with lands of high interest. This approach could rapidly increase the success and speed with which objectives of the strategy could be met, but represents a significant financial commitment to purchase several properties annually.

A blended approach over shorter time spans is another consideration, with some years reliant on donations and perhaps one annual or biannual purchase. In other years, a dedicated budget combined with the success of fund-raising

campaigns could allow for multiple purchases per year in concurrence with land and easement donations. Provincial and other funding initiatives may further influence the way and speed with which the strategy can be implemented.

Regardless of how the strategy is implemented, it is of some value to consider metrics against which progress can be measured. These targets are not **measures of success or failure, nor do they establish an 'end point' to which** all efforts should be targeted, but rather provide a context against which progress can be viewed. Targets provide a snap shot of activity that can be readily measured, easily understood, and are linked to drivers of the strategy.

## Setting a Minimum Target

In the proposed three primary target areas there are 256 privately-owned properties with an average parcel size greater than 40 hectares (~ 41 to 43). Without reviewing orthoimagery to determine areas to be conserved within each property, a conservative estimation is the majority of the parcels will not be vacant and likely only have a portion available to be conserved; albeit, the largest portion of each property, since these properties were targeted for their natural features which are generally unusable to the landowners. Adjusting for partial takings, the predicted secured area per property decreases to an even 40-hectare parcel.

Taking into consideration the number privately-owned properties in the watershed and the landowner outreach process, a minimum target can be established. Based on prior landowner outreach experience, it is estimated that 10% of landowners contacted would be interested in discussing land securement in greater detail. Not all projects come to fruition for a variety of reasons; most often because a landowner is disappointed with the appraisal. Conservatively, 5% of landowners contacted will result in land secured (13

landowners of the 256). This brings the total estimated secured area over the 10-year period to 520 hectares (13 landowners x an average size of 40 hectares per parcel), which can be rounded down to a goal of 500 hectares.

Therefore, with reliable support from funders and partners, and a highly active landowner outreach program, an achievable minimum target for NVCA can be to secure 500 hectares of priority lands in the three target zones by the end of 2030.

#### Minimum Securement Target

- Secure 500 ha by the end of 2030
- Secure 50 ha annually
- Secure 1 property per year

The first year after the adoption of this strategy should focus on landowner outreach and education. Actual closing of new securement projects will likely be few, if any, until mid-2021 but will increase as more landowners become aware of NVCA as a land divestment opportunity and about land stewardship options.

### Setting an Aggressive Target

As stated in the introduction to this strategy, in 2015, Canada adopted national targets known as the 2020 Biodiversity Goals and Targets for Canada. Canada Target 1 outlined a goal to protect at least 17% of terrestrial areas and inland water, and 10% of marine and coastal areas by 2020. There are many scientifically peer-reviewed studies that would argue for a higher percentage in order to maintain a healthy region, territory or watershed. However, this federal target was also determined through relevant background science and is already a very lofty national target.

Through implementation of this strategy and a Land Securement Program for 2020-2030, NVCA will automatically contribute to the Canada Target 1 goal by increasing land securement in Ontario within NVCA's watershed, building on the 5,240 hectares of land secured since 1960. However, a more ambitious goal could be made if we take the national target of 17% of terrestrial areas **and apply that same percentage to NVCA's watershed itself** – thus aiming to **ensure at least 17% of NVCA's watershed is secured through lands held by** NVCA and partner organizations by 2030. This goal can be used to establish a more proactive aggressive target.

As of 2020, combining all lands secured by NVCA and its government and ENGO partners, a total of 60,072 hectares (16.23%) of the watershed is protected. Attaining 17% total protection of the watershed equates to a total of 62,900 hectares, revealing a shortfall of 2,828 hectares, or 0.77%. Therefore, an additional 2,828 hectares of land is required if we take the 17% national Canada Target 1 goal and apply it directly to the watershed with a projected achievement date of 2030.

In order to secure an additional 2,828 hectares by 2030, approximately 282 hectares would have to be secured per year. Since government and ENGO partners in the watershed will continue to secure land alongside NVCA, it is not expected that NVCA take on the securement of all 2,828 hectares. Rather, if we focus on one quarter of the 2,828 hectares, which is 707 hectares, we have a more achievable aggressive target for NVCA. Rounding this number down to 700 would equate to an annual securement goal of approximately 70 hectares per year. Using an average target property size of 40 hectares, 70 hectares equates to 1 to 2 properties per year, or about 17 acquisitions in the 10-year span.

Therefore the aggressive target, which would contribute towards 25% of the overall 17% watershed protection goal, would be to achieve securement of 700 hectares by 2030.

#### Aggressive Securement Target

- Secure 700 ha by the end of 2030
- Secure 70 ha annually
- Secure 2 properties per year

### Getting by With a Little Help From Our Friends

These goals are not insurmountable in ten years but they are likely too much for NVCA to reach alone without a significant infusion of funding. Thankfully, there are several other securement partners active in the area to disperse the weight of these lofty goals; the most active being Simcoe County, Escarpment Biosphere Conservancy and Bruce Trail Conservancy, each with an average securement rate within the watershed of 15 to 25 hectares per year (based on the last 6 years). Yet, with the high annual target recommended in this strategy, the current level of securement partner contributions is relatively low. Fortunately, there are more partners that could help.

Oak Ridges Moraine Land Trust, Couchiching Conservancy and Blue Mountain Watershed Trust have also expressed a desire to work with NVCA to secure more lands which should help in raising funds to close on projects.

Dufferin County would entertain partnering on securement projects on a case-by-case basis. Their interests lie in achieving more forest cover.

Grey County will entertain land donations and may help NVCA cover the soft costs (e.g. appraisal, survey, closing costs). They are not interested in land purchases at this time.



All partners have varying levels of interests and their own specific interests. Focusing on lands that maximise partner interests will achieve faster and easier results.

## Land Securement Target Summary

### Securement Targets – 2020 to 2030

- Minimum Securement Target
  - Secure 500 ha by the end of 2030
  - Secure 50 ha annually
  - Secure 1 property per year
- Aggressive Securement Target
  - Secure 700 ha by the end of 2030
  - Secure 70 ha annually
  - Secure 2 properties per year

These targets should be reconsidered (hopefully increased with momentum) in ten years when updating this strategy.

Presumably, other land securement projects will continue outside these three target zones by other securement partners. Furthermore, there may be landowners outside the three target zones that request to donate their lands to NVCA that could be worthy of securement. These projects will add to the aforementioned broader securement target.

In order to cost-effectively maximize annual securement targets, there are the following necessities:

- Develop an active landowner outreach program in the top three priority target areas;
- Focus on donations of land;
- Work with other securement and funding partners; and

- Prepare for a biannual securement project campaign (i.e. purchase).

## Landowner Outreach

Now that the target areas have been selected within the watershed and individual landowners have been selected, the process begins of contacting those landowners. A primary goal of this land securement program is to **educate landowners with significant landholdings within NVCA's watershed** (i.e. > 20 ha) about the various long-term conservation options that are available to them. Most landowners only know about two options when it comes to their land:

1. Sell it; or
2. Leave it to their children.

**Deciding to protect one's property for the long-term** is a big decision and that decision can take a landowner several years to make. Even if a landowner **doesn't express interest in the various** conservation options available when first presented, the landowners now have increased awareness about conservation options in case they change their mind in the future. As in fundraising, approaching people for land donations also requires patient cultivation. Building relationships is important.

The approaches listed below involve proactive landowner outreach; however, the possibilities are good that some landowners will take the lead at contacting NVCA to discuss the donation or sale of their land. Especially, if NVCA or its partners are active in the watershed, have a good reputation with landowners and the community, and are practicing good communication of land securement programs and tax incentives to landowners.

The initial steps associated with landowner outreach include developing a landowner contact list, preparing landowner packages and property mapping.

These activities can be undertaken by NVCA staff or by a third-party contractor.

The landowner outreach program will include:

## Developing a Landowner Contact List

Using the recommended take-lines, a landowner list is developed for each targeted area. Landowner contact information needs to be collected, specifically mailing address so that packages can be mailed and followed-up on. If emails and phone numbers can be collected, there will be a greater chance of connecting with landowners, however, those methods of contact are harder to obtain. For areas where partners are directly involved in landowner outreach (e.g. BTC along their optimum route corridor), these landowners can be included on the list, but the contact can be left to the partner organization, therefore reducing duplicate efforts. This is another reason why communication between partner conservation organizations, is so important.

**Recommended Staff Implementation:** If staff resources are minimal, this step can be performed by contract staff or summer students.

## Landowner Leads

Getting warm leads and introductions can significantly boost any landowner outreach initiative and effectiveness of communications. An introduction bridges trust between parties. There are likely many landowners within the target zones that have already interacted with NVCA. Some interactions have been negative, especially when violations have been issued and permits denied. With bad history, NVCA staff should not approach unless the property is listed for sale. If the properties are also within an area of interest to a land securement partner(s), NVCA should pass those leads to that partner for contact.

Other NVCA interactions with landowners have been positive, especially with stewardship programs. The landowner list should be circulated to the stewardship and forestry personnel of NVCA. For those identified landowners that already have shown an interest in conservation, the staff member with the best relationship should approach and arrange an introduction.

NVCA board members should also be asked to provide leads and introductions to key landowners. As board members are local politicians, they know many landowners in their communities/wards. If a board **member doesn't know a** specific landowner of interest in their area, they should be able to direct you to someone who does.

## Mail Campaigns

This will involve sending out an introductory letter (Appendix 3), a brochure outlining the various long-term securement options, a photo mosaic map of the subject property (potentially showing ecological features), Ecological Gifts Program Brochures, and if appropriate, NVCA program brochures. The goal here is to **introduce the landowner to the material and 'break the ice' so that** a telephone call, email or drop-in can be made a few weeks later, following up on the material provided.

Recommended Staff Implementation: If staff resources are minimal, this step can be performed by contract staff or summer students.

## Telephone Contact

As more people are forgoing landlines, it is harder to find phone numbers. Nevertheless, Canada 411 should still be utilized. For those phone numbers obtained, calling landowners to introduce them to long-term conservation options and to other stewardship programs offered.

The objective is to arrange a meeting, ideally on the property, rather than to discuss details over the phone. A face-to-face, is much more engaging and trust building format. It is highly recommended that this step follow the mail campaign so that the telephone call is not a 'cold call'.

## Drop Ins

Following mail campaigns, there are often returned mail. If there is no other way to contact the landowner, knocking on the door is prudent to bring the information to them.

Even when packages have been mailed out and presumably received, if a phone number is not available, dropping in is often very effective. Some landowners are interested in exploring the information mailed to them but **often don't act on it immediately. The package gets placed in a drawer with good intentions to follow up with NVCA, but gets forgotten.** Thus, making the effort to reach out personally to make sure the package was received and be available to answer questions or to arrange a meeting at their convenience is received well.

For those properties that are gated or warn of no trespassing, have another package on hand to leave at the gate or roadside mailbox. Adding a note to **the effect of "We would like an opportunity to meet with you to discuss land conservation options that you may wish to take advantage of."** may increase the likelihood of a favourable response.

## Landowner Forums

An effective way to meet and engage landowners is at a forum designed to provide them with information on a variety of topics related to land conservation and estate planning. To maximize attendance, the following guidelines should be considered:

- A date on a weekend or evening
- To not exceed three hours
- Geographically close to the targeted land securement zone
- Send postcard invitations requesting RSVP
- Follow-up with each landowner to ensure receipt of invitation and ask if they plan to attend, or if they would rather have a private visit/consultation

## Scheduled Site Visits

Once a landowner is contacted and they express some interest in the program, a site visit or landowner visit can be scheduled and a Property Evaluation Form can be filled out (Appendix 4). This may not include a site visit of the property but may instead be a detailed discussion of the initial landowner package that was sent to them. At this time, more information can be provided to the landowner about the potential options available to them.

## Timelines & Expectations

It is recommended that in Year 1 of implementing this strategy, over 200 landowners be contacted. This is based on reaching out to all pertinent landowners in the three Primary Target Areas after refining a list of landowners. The number of landowners contacted in subsequent years in the Secondary Priority Areas can be adjusted based on landowner response from Year 1. Based on other landowner outreach programs, it is expected that an average of 10-20% of landowners will express an interest in learning more about conservation. Of these, a smaller percentage will be interested in **detailed securement discussions. The focus of Year 2's work not only involves** contacting new landowners, but also requires follow-up with contacts previously established in Year 1. Sometimes it can take several years to

cultivate a relationship with a landowner before they are ready to make a decision on protection of their land. The landowner outreach process is repeated every year, with new contacts being established, and continued relationship-building with those who express interest in the program.

## Other Items of Discussion

The main goal of having a landowner outreach program is to secure more ecologically sensitive lands; however, there are also two other advantages to having this program which NVCA can directly benefit from. Even if a landowner decides not to become involved with putting their land or a part of their lands into permanent protection, they may decide to support NVCA and its mission through a financial contribution. This is a perfect opportunity to foster or **cultivate the relationship with the landowner to seek an individual “ask” for support**. Another advantage to this landowner outreach program is the spin off message about the long-term stewardship program options available to landowners. So, even if the landowner is not interested in the land securement options, the landowner outreach person can educate them about the various stewardship options and give them the necessary contact information to follow-up with.

For those landowners interested in having their land secured, they should be made aware that they need to seek personal legal and financial advice before making any decisions.

Besides the mailing of packages, another way of communicating the information to landowners about the various long-term securement options **and donations of land is to add this information to NVCA’s website**. This will allow landowners to review donation information posted on the site, and contact NVCA proactively, if they are interested. Also, NVCA is encouraged to give presentations to the various groups and clubs (e.g. Rotary Club, local real



estate board) in the watershed, as another means of educating landowners and realtors about conservation options and tax benefits.

Some landowners who are considering long-term options for the protection of their property can be very sceptical of whether or not they will have a guarantee that the land they donate would never be sold or destroyed in the future. The long-term protection of their properties is definitely a concern from the **landowner's perspective. NVCA will need to consider its key messaging** and policies relating to long-term protection and securement, in order to communicate this to landowners and alleviate any concerns they may have.

Landowner outreach is best done by either a trained staff person or experienced contractor or land securement partner. The representative needs to be engaging, creative in finding ways to make securement options work for a landowner and NVCA, and knowledgeable about the Ecogifts Program.

## Property Evaluation Procedures

In order to evaluate potential securement opportunities in an efficient manner, it is important to screen potential land securement initiatives to focus staff time and resources on the most ecologically significant securement opportunities. This will help maintain the momentum of land securement projects.

### Land Securement Project & Evaluation List

NVCA should work to develop and maintain a list of land securement projects **divided into category A for "active" securement projects and category B for "potential" properties for securement. Projects in category A would have a signed commitment in a letter of intent or agreement of purchase and sale.** Category B would include those properties that have landowners expressing interest in land securement options and warrant further consideration.

Before placing a candidate property on either list, a property evaluation involving desktop analysis, and where necessary, field investigation, should be undertaken (Appendix 4). This will provide an assessment of the ecological significance of the property in the context of the identified target areas. Further, the desire of NVCA to acquire the property and the landowner's interest in working with NVCA to develop a mutually acceptable transaction will need to be assessed. This could take the form of a fee-simple purchase, donation, or easement. Depending on the property history and preliminary site evaluation, additional environmental studies may also be required (e.g., Phase 1 Environmental Assessment).

Properties that have been moved on to the active list will then be pursued for securement upon review and recommendation by the CAO and approval of the board. This will involve identifying the funding source(s) to secure the property. Once the funding is determined, the field representative will proceed to secure the property (i.e., negotiate agreement, obtain appraisal, commission survey, etc.).

When assessing the suitability of land for securement, consideration will be given to the stewardship costs of the property. Where it is desirable to have a municipality or a local environmental non-government organization (ENGO) help manage a property, arrangements would be made in advance with the respective municipality to have an agreement in principle to include the land under a management agreement.

## Program Funding

**NVCA's land securement program has** been mostly reactive by responding to landowners or other securement partners as properties become available and through partner projects. Most of the securement activity has been in the Minesing Wetlands with the help of the Nature Conservancy of Canada.

At the time of writing this report, there are no provincial sources of land securement funding available. The following sections outline the costs associated with acquisitions in the past few years and the projected costs over the 10-year program.

### Securement Costs

Even with a land securement program that focused only on receiving land donations or taking on purchases that have the purchase price covered by outside funding sources, there are still significant securement costs. Just one fee-simple land donation has the following approximate securement costs associated with it:

- Appraisal \$4,500 - \$7,000
- Legal \$1,500 - \$3,000
- Survey (if required) \$2,500 - \$7,000
- Phase 1 EA (if required) \$2,500 - \$4,000
- Staff/contractor time \$5,000 - \$10,000

Some of the above costs can be recovered through some available funding programs. Nevertheless, it would be prudent to budget at least \$25,000 per acquisition even though there may be ways to recover those funds from partner organizations.

If NVCA is to achieve the minimum 500-hectare goal in ten years (> 50 ha/year), in the three primary securement zones, a minimum budget allocation of about \$37,500/year would be recommended. The primary cost associated with the land securement program is hiring or allocating sufficient time to a dedicated staff Land Securement Officer or retaining an experienced contractor to establish the land securement program. This program will be focused on donations of land or purchases of land through leveraged partnership funds or split-receipt options to keep land costs at a minimum. In addition, monies will be raised through various securement programs in order to cover costs associated with legal, appraisal, survey, environmental audits, demolition and property clean up, H.S.T., land transfer tax, interest charges, fencing, administration, and other related costs. These expenditures will be based on the funding provided to date and the opportunities for various programs and partnerships outlined below.

## Funding Alternatives

The following outlines a variety of potential funding sources for land securement. Table 6 lists some agencies and project parameters.

### Municipal Funding

The conservation of lands benefits all municipalities within the jurisdiction of NVCA by maintaining their ability to accommodate the natural functions and features of the ecosystem and providing open space for the enjoyment, health, and well-being of all residents. The conservation of the natural heritage system including issues related to the quantity and quality of water is of benefit to the people of the entire watershed and will contribute positively to the quality of life for future generations.

Where appropriate, as land securement opportunities present themselves, each upper and lower tier municipality would be consulted to determine if there is any funding available to support the securement initiative.

### Land Securement Working Group

Currently, the Regions of York and Peel have Land Securement Working Groups and funding in place that provides an opportunity for area municipal, agency and other key stakeholders to network and discuss land securement activities and priorities. This is an important forum for sharing approaches and avoiding duplication of efforts and resource utilization. **Unfortunately, NVCA's watershed does not fall within York Region's jurisdiction and only a very small area falls within Peel Region's jurisdiction. However** NVCA could approach the counties of Grey, Dufferin and Simcoe with the suggestion that they consider adopting a program similar to the land securement model used by Peel and York.

### Provincial Funding

There are several securement partners including the Nature Conservancy of Canada, Ducks Unlimited Canada, Bruce Trail Conservancy, Oak Ridges Moraine Land Trust, Ontario Nature, Couchiching Conservancy, the Blue Mountain Watershed Trust, Escarpment Biosphere Conservancy and **NVCA's** municipal partners that have access to funds, funding programs and/or can aid in fundraising. As NVCA increases its land securement program and garners landowner interest, more projects come to fruition. As there are more projects, there comes an increase in aligning with a successful program from funding partners, especially with positive media coverage. With the assistance of potential funding partners it is anticipated that the solicitation of donations of money and land can be significantly increased in NVCA's watershed.

### Financing Land Purchases

For fee-simple purchases and split receipts, long closing dates (6 - 18 months) should be negotiated to allow for fundraising. Furthermore, an escape clause can be established if funds raised are insufficient by a certain date eliminating the risk to NVCA.

As previously described, an option to purchase allows NVCA to buy a property at a set price for a stipulated period of time. This mechanism not only gives **NVCA a means of “buying time” in its attempts** to acquire a specific piece of land but it also provides the perfect opportunity for fundraising. There is no **greater success in the land securement community then when a ‘call for support’ or a ‘call to action’ is expressed. The sense of urgency to raise** funds for a key property is always a perfect recipe for success. Many conservation organizations have secured important properties this way by calling on individuals, partners, members and corporations to assist in buying and protecting a particular property. When this type of campaign is done properly, the money is usually raised at the pre-determined goal, and sometimes it is exceeded.

## Land Securement Success & Promotion

The term “**success breeds success**” is highly applicable to the securement of ecologically sensitive lands. Unless highly confidential for whatever reason, **once there is the ‘success’ of securing a property within a given area, NVCA** should give close consideration to the messaging and leveraging of this success to create even more success. Whether the property was purchased or donated, a single success can be used to generate local, regional or even provincial attention which in turn can lead to increased funding, an increase in interested landowners and an increase in partnership support. Especially in the case of land donations, this may encourage other landowners to do the same. This landowner can in turn be invited to act as a champion in their area

of the watershed. Below are some recommendations for communicating success in NVCA watershed.

#### Recommendations for Community Outreach & Promoting Land Securement

- Ensure that all partners involved in the securement of a property are given proper recognition;
- Invite local, county and provincial politicians to the event (federal if donation);
- Ensure that the event or success is covered by all forms of local and regional media (i.e. newspaper, television, radio);
- Ensure that the event is communicated through internal media like newsletters, websites, social media, etc.; and
- Use the media articles, or newsletters or other internal communications to send to interested partners, landowners etc.

### Stewardship Endowment Funds

This strategy is recommending the securement and ownership of more lands by NVCA. In order to provide adequate resources in perpetuity for properties and stewardship related activities, a detailing of stewardship costs is required for each new property that is to be acquired (both fee-simple and conservation easement properties). Costs should include both infrequent and short-term costs (i.e. tree planting) and repetitive and long-term costs (i.e. property taxes, insurance, clean-up, monitoring, fencing, etc.). The costs can be categorized as those that are administrative (Category A below), or conservation stewardship related (Category B below). There is more direct management on land that NVCA owns versus lands under conservation easement agreement. Examples of stewardship costs are listed below as well as their likelihood for fundraising.



## Land Administration - Carrying Charges

- For NVCA owned properties: taxes, risk management, insurance, access, perimeter signage, fencing for neighbours or trespass (note - difficult to fundraise for and more reliant on interest from an endowment fund).

## Conservation Stewardship - Managing Sites based on NVCA Mission

- NVCA owned properties: conservation fencing, burning, removal of invasives; interpretive signage; partner/volunteer support; community relations.
- Both owned and easement properties: Inventory; site monitoring (note - higher likelihood of fundraising for projects).

Once NVCA has a detailed understanding of stewardship costs, a strategy for managing these in perpetuity can be developed. Depending on the budgeting structure of NVCA, one highly recommended approach is to develop a stewardship endowment fund.

The fund is generally managed and set-up as a separate fund, with income (e.g. interest) allocated for stewardship purposes. Up to 5% of income in any one year is allocated for stewardship purposes. Income above 5% remains in the fund to offset annual inflation, grow the fund and to protect the purchasing power of the endowment over time. This type of fund would ensure that funding for most stewardship activities or land-related costs are secure. For special projects that may be periodic and require additional funding (i.e. restoration), further fundraising would be required. The amount required in the fund would be determined from the projected stewardship costs and would **change over time as NVCA's property portfolio changes.**

As NVCA increases the amount of land protected, it is recommended that NVCA consider developing and implementing a stewardship endowment fund,

based on its current and future costs of its stewardship program (for both fee-simple and conservation easement agreements). An easy way to implement and fundraise for this fund is to have a policy whereby any new property secured must have stewardship endowment funds in place before the property closes. It can become part of the securement proposal. Sometimes the best person to ask to contribute to this fund is the landowner themselves. Who better to see the property protected and stewarded in perpetuity than the person who has nurtured the lands for so long?

The industry standard for a stewardship endowment fund is 15% of the purchase price; however, stewardship costs should be determined on a case-by-case basis following a site visit and discussion with the landowner. Stewardship concerns should be assessed and detailed in the Property Evaluation Form (Appendix 4).

Stewardship budgets should be included in management plans for NVCA conservation areas. As NVCA develops new management plans and updates existing ones, stewardship budgets for these areas, and any adjoining nature reserves, should be addressed accordingly.

## Enforcement or Legal Defence Funds

In addition to having a stewardship endowment fund, it is important to consider having a legal defence fund for NVCA easement properties. For example, in the event where a conservation easement agreement has been violated, NVCA will take every measure possible to mitigate the situation with the landowner in a friendly benign way. However, this approach may not always be successful and may require the support of legal counsel, or involvement in legal proceedings. The cost of defending an easement could range from thousands to hundreds of thousands of dollars per property depending on the situation. By having a separate legal defence fund, these

funds could be properly allocated, tracked and managed to ensure that they are in place when needed. The determination of the amount for the fund could be based on the number of NVCA conservation easements and the likelihood of risk to these easements.

It is the responsibility of NVCA to uphold its conservation easements and set a precedent for other landowners. Therefore, by having a legal defence fund, it shows the community and future easement landowners, that NVCA is serious about enforcing its easements and protecting the natural features of the watershed as well as its reputation as a conservation authority.

## Land Disposition Policy

Over the decades, NVCA may have received lands that contain no ecologically significant features. Additionally, through the development and refinement of the natural heritage system reports **for NVCA's areas of focus**, lands may be identified as surplus due to limited or no ecological significance.

As NVCA does not endorse the sale of lands containing significant features, it is recommended that NVCA develop a Land Disposition Policy. Where the land still warrants protection but NVCA determines that another conservation group would be better suited to manage the property, such lands can be transferred with a land holding agreement to ensure the land remains protected.

In either case, for lands that are recommended for disposition, the following requirements would apply:

- a) That **all surplus lands be offered "as is"**.
- b) That land proposed for use for transportation, infrastructure, utilities or other routine public purposes identified by a municipality or lands identified through an individual Environmental Assessment or Class Environmental Assessment is disposed of at nominal consideration.

Where a municipality or public agency requests the disposition of NVCA lands, all costs associated with the transfer of title or easement (e.g., legal, appraisal, survey costs) will be the responsibility of the requesting agency. If a property appraisal is required, it will be commissioned by NVCA and paid for by the requesting agency.

- c) That a staff report be prepared detailing the technical concerns of the disposition, the environmental significance of the lands, potential impacts of the disposition, any mitigation requirements associated with the lands and remaining NVCA land holdings. The proponent may be required to prepare an environmental review documenting the above noted matters. The scope of this assessment will be determined in consultation with NVCA staff, agency staff and/or their consultants prior to any work being undertaken.
- d) That the proposed disposition of land first is offered to the local municipality and the county within which the lands are located for either purchase or lease. Where lands have been acquired through a donation or bequest of lands that do not contain environmentally significant lands and the owner has given permission for NVCA to use or dispose of the lands as NVCA desires, the staff report outlined in 12.3 may not be required. This will be determined at the discretion of the board.
- e) When the disposition involves any lands where the Ministry of Natural Resources Forestry (MNRF) provided funding for the acquisition of the subject lands, that the proposed disposition be circulated to MECP which has assumed the responsibilities related to land conservation. At the time of writing this strategy, provincial government restructuring is relatively new and MECP staff have yet to determine how to deal with such land disposition but may default to (or be similar to) **MNRF's** Policies and Procedures for the Disposition of conservation authority Lands.

- f) That all land sales generally be appraised at market value by an Accredited Appraiser Canadian Institute (AACI) qualified appraiser. The sale may be subject to conditions to ensure objectives are met. Where an appraisal of land value is required, the appraisal will be commissioned by NVCA. Lands with an anticipated value of less than \$40,000.00 may not require a full appraisal at the discretion of the CAO or the board.
- g) Generally, where lands were donated to NVCA, the family who donated the property will be given first right of refusal or requested for consent to sell unless otherwise stated in the terms of the donation or bequest.
- h) NVCA should develop a policy whereas any proceeds from the sale of any lands shall be used to acquire other conservation lands or be used for the direct care of the existing conservation lands and easements.

There are some situations where the aforementioned guidelines need not apply. For example, when a landowner wants to donate or sell the entire property rather than just the naturally significant portion through direct conveyance, NVCA can accept the entire

property and then sever off the non-ecologically significant portion (e.g. residential lot, farm) and sell to recoup funds. This type of agreement would be pre-arranged with seller/donor of the property

There are also times that someone donates or bequeaths an asset to NVCA instead of liquid funds. Real estate can be such a gift. If it holds no ecological significance, it should be sold and the funds would be used to secure ecologically significant or targeted lands.

# Action Item Summary

Below is a summary of action items discussed in this report.

- **Determine 10-Year Land Securement Target:** Determine NVCA land securement target and integrate into work plans. Minimum 500 ha by 2030, or the more aggressive 700 ha by 2030.
- **Landowner Outreach Program:** Develop a landowner outreach program in the top three priority target areas. The initial steps associated with landowner outreach include developing a landowner contact list, preparing landowner packages and property mapping. These activities can be undertaken by NVCA staff or by a third-party contractor.
- **Land Securement Project & Evaluation List:** NVCA should work to develop and maintain a list of land securement projects divided into **category A for “active” securement** projects and **category B for “potential” properties** for securement. Projects in category A would have a signed commitment in a letter of intent or agreement of purchase and sale. Category B would include those properties that have landowners expressing interest in land securement options and warrant further consideration.
- **Biannual Securement Project Campaign:** Prepare and facilitate a biannual securement project campaign focusing on land securement through purchase.
- **Land Securement Working Group:** The Regions of York and Peel have Land Securement Working Groups and funding in place that provides an opportunity for area municipal, agency and other key stakeholders to network and discuss land securement activities and priorities. This is an important forum for sharing approaches and avoiding duplication of

efforts and resource utilization. Unfortunately, NVCA's watershed does not fall within York Region's jurisdiction and only a very small area falls within Peel Region's jurisdiction. However NVCA could approach the counties of Grey, Dufferin and Simcoe with the suggestion that they consider adopting a program similar to the land securement model used by Peel and York.

- **Trade Lands Policy:** It is recommended that NVCA develop a trade lands policy. Lands disposed of by NVCA will follow the Land Disposition Policy outlined in this report. The policy would include direction for proceeds from the sale of lands to be used to acquire other conservation lands or be used for the direct care of the existing conservation lands and easements.
- **Land Disposition Policy:** it is recommended that NVCA develop a Land Disposition Policy in order to address the disposal of lands identified as surplus due to limited or no ecological significance. Where the land still warrants protection but NVCA determines that another conservation group would be better suited to manage the property, such lands can be transferred with a land holding agreement to ensure the land remains protected.

## Conclusions

Since 1960, NVCA has secured 23 ecologically significant sites and several conservation easement agreements totalling 5,240 hectares of mostly environmentally sensitive areas within the watershed. In combination with lands protected by partner agencies, including Ontario Parks, counties, and land trusts such as the Bruce Trail Conservancy and Oak Ridges Moraine Land Trust, 60,072 hectares have been protected within the 370,000-hectare watershed.

With a concerted effort in expanding its land securement program over the next 10 years, specifically by fostering more active partnerships with land trusts and counties, and by implementing targeted landowner outreach, NVCA can achieve a greater increase in land securement success in the watershed.

The minimum land securement target established by this strategy is to add 500 hectares **to NVCA's current holdings** by 2030. The more ambitious aggressive land securement target established by this strategy is to add 700 **hectares to NVCA's current land holdings by 2030**. The aggressive target would contribute towards securing 25% of the land required to achieve 17% total protection of the watershed, combining lands from all conservation organizations and agencies.

## Securement Target Summary

### Securement Targets – 2020 to 2030

- Minimum Securement Target

A reasonable minimum localized securement target of 500 hectares total for the three Primary Target Areas alone:

- Secure 500 ha by the end of 2030
- Secure 50 ha annually
- Secure 1 property per year
- Achieving this goal would increase NVCA land holdings from 5,240 to 5,740 hectares

- Aggressive Securement Target

An aggressive target of 700 hectares total can be achieved by expanding landowner outreach to include the other securement zones identified in the strategy, one at a time, once the first three have been saturated. This target



would contribute towards securing 25% of the land required to achieve 17% total protection of the watershed.

- Secure 700 ha by the end of 2030
- Secure 70 ha annually
- Secure 2 properties per year
- Achieving this goal would increase NVCA land holdings from 5,240 to 5,940 hectares

The first year of implementation of this strategy should focus on building relationships with land trusts, and applicable municipal staff, to make agreements to terms of securement on lands of mutual interest. Concurrently, there will be a concentrated focus of landowner outreach in the three Primary Target Areas:

1. Minesing Wetlands Expansion
2. Minesing Wetlands to Wagner Corridor
3. Osprey Wetlands to Nottawasaga Bluffs

By strategically targeting specific landowners within the watershed, NVCA can maximize time and resources in securing more ecologically significant lands. By utilizing existing land securement partners, funding partners and other available resources within the watershed, NVCA can succeed in securing additional lands while keeping costs at a minimum.

Future securement of ecological lands by NVCA will be achieved through fee simple donations first (full value or split-receipt), followed by important purchases. Conservation easements will generally not be considered, but are discussed in this report in the unlikely event that NVCA opts to pursue an easement project in the future.

**This Land Securement Strategy furthers NVCA’s mission and goals by securing** interests in land, both through purchase and holding rights to property, thereby protecting ecological and flood hazard areas from potential future development and incompatible uses (e.g. intensive agriculture). Where possible, the rehabilitation and restoration of land that has, or is, experiencing degradation will be implemented by NVCA and other partners. Further, working with farmers and the Ontario Farmland Trust can help bridge the preservation of both ecologically significant and prime agricultural lands.

Through the implementation of this strategy, NVCA can move towards an achievable goal of securing more ecologically significant lands in the watershed. Early and quick success will be communicated to local and regional **governments and the community, which will enhance NVCA’s role in the** watershed as a leader in environmental protection.

The information presented in this strategy is for 2020-2030 timeframe, and it is recommended that this strategy be reviewed and revised accordingly every 10 years.

# Appendices

Appendix 1: Ecological Gifts Program

Appendix 2: Conservation Land Tax Incentive Program

Appendix 3: Sample Landowner Contact Letter

Appendix 4: NVCA Property Evaluation Form

## Appendix 1: Ecological Gifts Program

The Ecological Gifts (Ecogifts) Program enables owners of property with ecologically sensitive natural features to preserve wildlife habitat. Ecological Gifts are qualified charitable land donations that generate enhanced income tax benefits. Donations of fee simple title and partial interests, including conservation easements, are eligible. In many scenarios the landowner can continue to hold title and/or live on the land.

To qualify as Ecologically Sensitive, land must satisfy at least one criterion from **an 'A' List of Specific Categories of Qualified Lands and one or more from a 'B' List of General Criteria for Other Ecologically Sensitive Lands** (see below).

Gift recipients include land trusts and other conservation charities, and government agencies chosen by donors and approved by the federal government. Donors of Ecogifts receive a donation receipt for the fair market value of the gift.

Ecological gifts receive tax treatment that is superior to most other charitable gifts. Ecogift tax advantages include:

- Eliminated taxable capital gain on the disposition of the property
- No income limit for calculating the tax credit/deduction
- Donation value certified by the Government of Canada
- Tax liability for donees that do not protect the gifted land

The process of making an ecological gift is relatively straightforward. The donor will basically have two steps to complete that include providing: (i) information to support the evaluation of the land as ecologically sensitive, and (ii) an appraisal of Fair Market Value by a qualified appraiser along with a signed Application for Appraisal Review and Determination. The donor and recipient will generally cooperate on the application to confirm that the

property is qualified as ecologically sensitive. The recipient will also often help the donor arrange for the appraisal of fair market value.

For more information you can visit the Ecological Gift website at:

<http://www.on.ec.gc.ca/wildlife/ecogifts/ecogifts-e.html>

## Provincial Eco-sensitivity Criteria – Ontario

### A) Specific Categories of Qualified Lands

Lands, easements or covenants relative to such lands, which fall into one or more of the following categories shall be deemed to be ecologically sensitive lands in Ontario. This is provided terms of easements or covenants regard and protect the ecologically sensitive features of the land.

A1. Significant portions of the habitat of species determined to be endangered, threatened or vulnerable in Ontario, as specified in a recovery plan or other biological study;

A2. Areas designated as Provincially Significant Wetlands;

A3. Provincial or regional Areas of Natural and Scientific Interest;

A4. Designated Areas of Concern for biodiversity purposes as identified in Forest Management Plans;

A5. Areas qualifying for the Conservation Land Tax Incentive Program;

A6. Areas managed for wildlife habitat conservation purposes that qualify under the Managed Forest Tax Incentive Program;

A7. Areas promoting the conservation of natural heritage and biodiversity that are identified within a regional or watershed plan or strategy developed by a recognized conservation organization;

A8. Areas designated as a World Heritage Site for biodiversity conservation purposes, a core area of a UNESCO Biosphere Reserve, or a Wetland of International Importance under the Ramsar Convention;

A9. Areas of biodiversity significance identified in a Canadian Heritage Rivers Management Plan or Strategy;

A10. Areas designated in the Niagara Escarpment Plan as an Escarpment Protection Area or an Escarpment Natural Area;

A11. Areas designated as Natural Core, Natural Linkage, Sensitive Hydrological Feature, High Aquifer Vulnerability, Significant Landform, Minimum Areas of Influence or Minimum Vegetation Protection Zones within the Oak Ridges Moraine Conservation Plan;

A12. Areas designated Core Area, Corridor or Restoration Area in the Lake Ontario Greenway Strategy;

A13. Areas designated for biodiversity conservation purposes within Management Plans or Strategies for the Trent-Severn or Rideau Waterways;

A14. Areas within a municipal official plan or zoning by-law under the *Planning Act* (Ontario) designated as an Environmentally Sensitive Area, Environmentally Significant Area, Environmental Protection Area, Restoration Area, Natural Heritage System or other designation for similar purposes that are compatible with the conservation of the biodiversity, ecological features and functions of the site;

A15. Areas within or adjacent to a Provincial Park, Provincial Park Reserve, Conservation Reserve, Conservation Area, Wilderness Area, Provincial Wildlife Area, National Wildlife Area, Migratory Bird Sanctuary, National Park, National Park Reserve or Ecological or Nature Reserve managed by a government or non-government agency;

A16. Municipal parks or other protected areas designated or managed for biodiversity conservation purposes;

A17. Areas identified as Carolinian Canada sites or alternate sites;

A18. Areas designated as Core Natural Area, Natural Area Buffer, Natural Area Link, or Valued Ecosystem Component in the National Capital Greenbelt Master Plan by the National Capital Commission; and

A19. Areas designated for biodiversity purposes by regional agencies such as the Niagara Parks Commission, St. Clair Parkway Commission, St. Lawrence Parks Commission and the Waterfront Regeneration Trust.

#### B. General Criteria for Other Ecologically Sensitive Lands

Lands, easements or covenants relative to such lands, that meet one or more of the following general criteria may also be considered to be ecologically sensitive lands in Ontario -- subject to the approval of the federal Minister of the Environment and Climate Change (MOECC) or a person delegated by the Minister for this purpose (the term "significant" for the purposes below refers to definitions provided in Provincial Policy Statements): This is provided terms of easements or covenants regard and protect the ecologically sensitive features of the land.

B1. Significant habitats such as alvars, prairies, cliffs, Great Lakes coastal habitats, old growth forest areas, glacial relic communities and sites with enduring geological features that contribute to biodiversity;

B2. Areas of wildlife concentration such as bat caves, snake hibernacula, heronries, deer wintering yards and sites used by migratory water birds and other species for seasonal staging, feeding, breeding and like purposes;



B3. Areas identified, designated or protected as ecologically significant or ecologically important by a government or non-government local, provincial, national or international system or body;

B4. Significant water bodies, rivers, streams, shorelines, valleys, wetlands, groundwater recharge areas, headwaters and aquifers;

B5. Significant wildlife or fish habitats;

B6. Significant woodlands;

B7. Areas that have significant current or potential for enhanced ecological values through restoration, remediation, management or geographic proximity to other ecologically significant properties;

B8. Natural buffers and adjacent lands around areas identified under other ecologically sensitive lands categories or criteria that contribute to the conservation of biodiversity;

B9. Natural links or corridors between areas identified under other ecologically sensitive lands categories or criteria that contribute to the conservation of biodiversity;

B10. Areas used for long-term scientific study or baseline and benchmark monitoring of biodiversity; and

B11. Areas that contribute to Canada's environmental heritage through the maintenance of the genetic diversity of species, ecosystem health, or landscape biodiversity, and other natural spaces of significance to the environment in which they are located.

The categories and criteria listed above, for the purposes of implementation of provisions in the *Income Tax Act* for ecological gifts, have been agreed to by representatives of the governments of Ontario and Canada. This list and

criteria may be further elaborated and amended by agreement between MOECC and the MECP.

## Appendix 2: Conservation Land Tax Incentive Program

Only lands identified by the Ministry of Natural Resources and Forestry as Provincially Significant are eligible for the CLTIP. These are a small subset of lands found in a natural state in Ontario. The eligible types of land are:

Provincially Significant Wetland;

Wetlands are lands covered by shallow water all the time, or in certain seasons, as well as lands where the water table is close to or at the surface. The abundant water causes the soil to be water-logged, and encourages growth of plants that either love the water or tolerate it well. Periodically soaked or wet lands that are being used for agricultural purposes and that no longer have the characteristics of wetlands are not considered wetlands under this program. Wetlands play a crucial role in the province. They:

- provide vital habitat for rare and endangered wildlife and many other species;
- maintain and improve water quality;
- help stabilize shorelines and control flooding and erosion;
- provide spawning grounds for fish;
- help ensure a stable, long term supply of water, by functioning as groundwater recharge and discharge areas;
- supply many social and economic benefits, such as opportunities for outdoor recreation and tourism; and
- ensure opportunities for the renewable harvest of products such as timber, fuel wood, fish, wildlife and wild rice.

MNRF has evaluated many wetlands more than 2 hectares in size, both in southern Ontario and parts of the north. Only wetlands that MNRF has identified as 'provincially significant' are eligible under the CLTIP.

Provincially Significant Area of Natural and Scientific Interest (ANSI);

ANSIs are areas of land and water that represent significant geological (Earth Science, ANSI-ES) and biological (Life Science, ANSI-LS) features. Earth Science ANSIs include areas that contain examples of rock, fossil and landform features in Ontario. These features are the result of billions of years of geological processes and landscape evolution. Life Science ANSIs are areas that contain examples of the many natural landscapes, communities, plants and animals found in the 14 natural regions of the province. MNRF identifies ANSIs that are 'provincially significant' by surveying regions and evaluating sites to decide which have the highest value for conservation, scientific study and education.

Habitat of endangered species;

An endangered species is any native species that is at risk of extinction or extirpation throughout all or a significant portion of its Ontario range. For purposes of the Conservation Land Tax Incentive Program, endangered species are those listed in regulation under *Ontario's Endangered Species Act*.

The 2002 **adoption of Canada's** *Species at Risk Act* (SARA) completed the National Strategy for the Protection of Species at Risk. The purposes of SARA are to prevent wildlife species in Canada from disappearing, to provide for the recovery of wildlife species that are extirpated (no longer exist in the wild in Canada), endangered, or threatened as a result of human activity, and to manage species of special concern to prevent them from becoming endangered or threatened.

Through these initiatives, Canada is making its commitment under the United Nations Convention on Biological Diversity a reality.

Endangered species habitat is the habitat necessary for the survival of populations of endangered species. The specific requirements of the various

endangered species are set out in MNRF guidelines for mapping this habitat. These guidelines are used to delineate endangered species habitat on a species-by-species and site-by-site basis.

A list of regulated endangered species in Ontario with MNRF rankings is published on the Species at Risk in Ontario (SARO) webpage at [ontario.ca](http://ontario.ca)

#### Niagara Escarpment Natural Area;

The Niagara Escarpment runs from Queenston, on the Niagara River, to the islands off Tobermory, on the Bruce Peninsula - a total of 725 kilometers. The Niagara Escarpment Plan divides the escarpment into 7 different land use designations, one of which is called "escarpment natural area."

Escarpment natural areas contain important plants and animal habitats and geological features. They are the most significant natural and scenic areas of the escarpment.

Protecting escarpment natural areas is important in order to:

- maintain the most natural escarpment features, stream valleys, wetlands, and related significant natural areas;
- encourage compatible recreation and conservation activities; and
- maintain and enhance the landscape quality of escarpment features.

Eligibility criteria for the new category are outlined in *Ontario Regulation 388/04* under the *Assessment Act*. Agencies interested in applying under this category should review this regulation.

#### Size

The conservation land must be at least 1/5 of a hectare in size. Therefore, if there is a building or structure on the property, the property must be greater in size.

## Buildings and Improvements;

The CLTIP does not provide tax relief for buildings or other improvements and associated land (the land associated with a structure or improvement is generally considered to be 2/5 hectares).

## Appendix 3: Sample Landowner Contact Letter

Date

Dear [insert landowner name]:

You may already be aware that the natural areas on your property are ecologically important. Have you ever thought about leaving a conservation legacy by having the natural features of your property protected in perpetuity for future generations?

I have enclosed an information package about an environmental land conservation program offered by the Nottawasaga Valley Conservation Authority. This program is being offered to you and other owners of ecologically significant land in the area who may be interested in leaving a natural legacy.

In accordance with your wishes, you can arrange for the natural features on your land to be protected in perpetuity. We are working with a wide range of conservation partners, both public and private, to provide land conservation opportunities to landowners, some of which offer tax advantages.

Please contact me at \_\_\_\_\_ if you wish to learn more about the program.

I would be happy to arrange a visit to meet with you at your property.

Yours in conservation,



## Appendix 4: NVCA Property Evaluation Form



### Land Securement Property Evaluation Form

Review of a land securement opportunity (purchase/donation/easement) within the watershed based on the following review process.

#### A. Property and Owner Particulars

About the property	
Owner Information (Name, Address, Phone No., Email)	
Legal address	
Mailing address	
Roll No.	
Family members and/or agent contact info	
Primary contact	
Sub-Watershed	

About the property	
Property Size	
Current Official Plan Designation(s)	
Current Zoning Designation(s)	
How was contact made?	
Motivation of landowner (e.g. cash sale, conservation, curiosity, tax benefits)	
Existing Mortgage (Y/N)	
Assessed Value	
Comments	

## B. Preliminary Property Investigation

Property Attributes	Yes/No/Not Applicable	Comments
Adjacent to other public lands or private conservation lands		
Tax Exempt (CLTIP, Easement)		
Contains features eligible for the Ecogifts Program		

Property Attributes	Yes/No/Not Applicable	Comments
Part of an identified municipal or provincial greenspace system		
History with the Permits, Complaints, and Violations		
Previous positive NVCA involvement (e.g. Stewardship Projects, donor)		

The ecological sensitivity of the subject lands is based on the following priority and secondary land securement criteria:

C. Priority Securement Criteria

Property Attributes	Yes/No/Not Applicable	Comments
Provincially Significant Wetland		
Areas of Natural and Scientific Interest (Earth Science).		
Areas of Natural and Scientific Interest (Life Science).		
Habitat of Endangered Species ( <i>Ontario Endangered Species Act</i> ).		
Community Conservation Lands		
Natural Heritage Features or Areas identified in the Provincial Policy Statement.		
<b>Regionally Significant ANSI's.</b>		
Habitats of species of special concern designated by MNR (species at risk).		
NHIC species occurrences or ecological communities (S1, S2, S3).		
Designated Natural Area, Protection Area or Rural Area in the NEP		

Property Attributes	Yes/No/Not Applicable	Comments
Designated Natural Core, Natural Linkage or Countryside in the ORMCP.		
Natural heritage areas identified within a regional or watershed plan or strategy developed by a CA under the CAA.		
Lands designated environmentally significant, environmental protection or equivalent in municipal Official <b>Plans (Includes NVCA, ESA's).</b>		
Areas within or adjacent to protected areas (i.e., provincial park, conservation reserve, or provincial wildlife area) that contribute to the natural heritage objectives of the protected area.		
Other criteria as may apply under the CLTIP program requirements.		
Distance to closest NVCA lands		
Identified NVCA property securement considerations		

#### D. Secondary Securement Criteria

Property Attributes	Yes/No/N ot Applicable	Comments
Georgian Bay Waterfront.		
Wetlands (Locally Significant).		
Significant waterbodies, rivers, streams, shorelines and valleys.		
Groundwater recharge areas, headwaters and aquifers.		
Significant wildlife or fish habitats		
Regional Flood Plain (flood and erosion risk).		
Significant Woodlands.		
Areas with enhanced ecological values through restoration and/or remediation (i.e., forest, stream, wetland).		

Property Attributes	Yes/No/N ot Applicable	Comments
Natural buffers and adjacent lands under other ecologically sensitive lands that contribute to conservation of biodiversity.		
Natural links or corridors between areas identified under other ecologically sensitive lands that contribute to conservation of biodiversity (i.e., through Natural Heritage Programs or Watershed Plans).		
Lands under Forest Management Plans (designated areas of concern for biodiversity).		



E. Determination whether securement is the most appropriate course of action in order to protect natural heritage lands

Criteria	Yes/No/Not Applicable	Comments
Are the lands significant in the context of the overall natural heritage system.		
Availability of funding for securement (purchase, donation, easement, appraisal, legal, survey etc.).		
Availability of funding for ongoing maintenance.		
Is there an immediate threat to the lands (future development, resource use).		
Proximity of property to lands already in public ownership.		
Willingness of owner to enter into negotiations.		
Sale Price at fair market value.		

Criteria	Yes/No/Not Applicable	Comments
Availability of maintenance access to the property.		
Potential municipal lease agreement.		
Preferred agency for securement (e.g., NVCA, Municipality, NCC, BTC, Couchiching Conservancy, ORMLT).		

## Summary and Recommendation for Securement

Evaluated by: \_\_\_\_\_

Date: \_\_\_\_\_

*Attach overview/locator map and property sized map*