



Implementation Guidelines

2018

Table of Contents

DEFINITION OF TERMS USED WITHIN THIS REPORT	5
SECTION 1: BACKGROUND	11
SECTION 2: LANDOWNER OUTREACH - CONSERVATION EASEMENTS AND LAND DONATIONS PROGRAM	14
2.1 Landowner Outreach Contact Process	14
SECTION 3: GREENLANDS SECUREMENT PROGRAM FUNDING APPLICATION	15
PROCESS 15	
3.1 Conservation Partner Responsibilities	17
3.2 Region of Peel Responsibilities	18
3.3 Local Municipal Responsibilities	20
3.4 Eligibility of Other Conservation Land Trust Organization Funding Requests	20
SECTION 4: PREPARING A GREENLANDS SECUREMENT FUNDING APPLICATION	21
4.1 Funding Eligibility.....	21
4.2 Eligible Land Securement Projects	22
4.3 Eligible Project Costs.....	22
4.4 Supporting Documents, Legal Documents and Professional Services	23
4.5 Consultation with Regional and Local Municipal Staff	24
4.6 Consultation for Funding Requests under Delegated Approval.....	25
4.7 Regional Council Meeting Schedule and Deadlines.....	25
SECTION 5: EVALUATING A FUNDING APPLICATION FORM	26
Table 1: Scoring System for Evaluating Greenlands Securement Projects	26
SECTION 6: FUNDING REQUEST DECISIONS AND APPROVALS.....	27
Table 2: Funding Request Approval Authority.....	27
6.1 Procedure for Obtaining the Written Approval of Funding Requests	27
6.2 Funding Request Conditions.....	27
SECTION 7: REPORTING	29
7.1 Annual Reporting.....	29
7.2 Performance Measures	29
APPENDICES.....	30
Appendix I Key Dates and Council Resolutions.....	31
Appendix II Landowner Outreach Coordinator Terms of Reference.....	32

Appendix III Landowner Outreach Contact Process	33
Appendix IV Greenlands Securement Program Funding Application Process	34
Appendix V Greenlands Securement Funding Request Application Form	35
Appendix VI Region of Peel Greenlands Securement Program Evaluation Form	44
Appendix VII Examples of Eligible Land Securement Projects	49
Appendix VIII Background Studies-Standards and Practices Manual	51
Appendix IX Greenlands Securement Program Appraisal Procedures	72
Appendix X Delegated Authority Approval Form.....	75

LIST OF TABLES

Table 1: Scoring System for Evaluating Greenlands Securement Projects.....	26
Table 2: Funding Request Approval Authority	27

Definition of Terms Used Within This Report

Areas of Natural and Scientific Interest

Areas of land and water containing natural landscapes or features which the Ministry of Natural Resources and Forestry has identified as having provincial significance, possessing values related to natural heritage appreciation, scientific study or education:

(a) Life Science

Areas of Natural and Scientific Interest are those areas identified by the Ministry of Natural Resources and Forestry for their high quality representation of important provincial biotic attributes.

(b) Earth Science

Areas of Natural and Scientific Interest are those areas identified by the Ministry of Natural Resources and Forestry for their high quality representation of important provincial geological attributes.

Associated Securement Cost

Costs required to complete a transfer of title or rights to property for the land acquisition method being used. These include costs such as legal fees, market value appraisal, baseline documentation report, environmental site assessment and real estate fees.

Conservation Easements

A landowner retains ownership of a property but allows restrictions on use to be placed on the deed to the property, thereby, establishing long-term protection of ecological functions on the property. The property owner may receive income tax benefits for the market value of a donated conservation easement over ecologically sensitive land as defined by the Federal Government for the purposes of the *Income Tax Act*.

Conservation Partner

An organization with an environmental mandate that has entered into a Greenlands Securement Agreement with the Region of Peel to implement the Region of Peel Greenlands Securement Program which has been approved by Council.

Core Areas of the Greenlands System

The Core Areas of the Region of Peel Greenlands System contain ecological features, forms and/or functions that provide favourable conditions for uninterrupted natural systems and maximum biodiversity. The Region and its partners value these areas for their importance in maintaining the integrity of the Greenlands System. These areas are protected by the Regional Official Plan. The Core Areas of the Greenlands System include:

1. Provincially Significant Wetlands, including coastal wetlands;

2. Core woodlands meeting one or more of the criteria as defined in the Regional Official Plan;
3. Environmentally Sensitive or Significant Areas;
4. Provincial Life Science Areas of Natural and Scientific Interest;
5. Significant habitats of Threatened or Endangered Species;
6. Escarpment Natural Areas of the Niagara Escarpment Plan; and
7. Valley and stream corridors meeting one or more criteria as defined in the Regional Official Plan.

Environmentally Sensitive or Significant Areas

Places where ecosystem functions or features warrant special protection. These may include but are not limited to rare or unique plant or animal populations or habitats, plant or animal communities, or concentrations of ecological functions. Environmentally Sensitive or Significant Areas are identified by the conservation authorities according to their established criteria.

Greenlands Securement Agreement

A Council approved agreement for a determined time between a Conservation Partner and the Region of Peel detailing the terms and conditions of the partnership for securing lands within the Region of Peel Greenlands Securement Program. This agreement outlines the obligations of the Conservation Partner and the Region of Peel and provisions regarding the funding of projects as it relates to the Greenlands Securement Program.

Greenlands Securement Capital Project

A capital project approved by Regional Council established to fund the Region of Peel portion of an approved funding request application. It was established to assist the Conservation Partners in achieving the goals and policies set out in the Region of Peel Strategic Plan and the Regional Official Plan that aim to protect, maintain and enhance key natural heritage features, functions and attributes through Land Securement tools. The capital project has previously been referred to as Land Securement Capital Project and Conservation Land Securement Capital Project.

Greenlands Securement Program

A Region of Peel funding program to provide a sustainable source of funding to help support the land securement efforts of Conservation Partners within Peel Region. This program has previously been referred to as the Greenlands Securement Project.

Greenlands Securement Reserve

A financing source, established to provide funds to Regional Council approved Greenlands Securement Capital Projects. It is funded via a contribution from the Greenlands Securement Program operating cost centre.

Landowner Outreach - Conservation Easements and Land Donations Program

A component of the Greenlands Securement Program designed to assist the Conservation Partners in broadening their land securement efforts in Peel Region through landowner education on land donations and conservation easements in strategically targeted areas throughout Peel Region.

Land Acquisition

The attainment of interest in land title for conservation purposes. It encompasses, without limitation, the tools of donation, conservation easements, and fee-simple purchase.

Land Donations

A gift of land to a conservation organization. The property owner may receive income tax benefits for the market value of donated ecologically sensitive land as defined by the Federal Government for the purposes of the *Income Tax Act*.

Land Securement

The protection of key natural heritage features, functions and attributes using a range of tools, including but not limited to planning policy; stewardship; monitoring; and acquisition through bequests, easements, donations or purchase. Planning policy, stewardship and monitoring should be pursued as the first steps in all securement opportunities, after which acquisition may be considered. However, to protect significant natural heritage lands in perpetuity through public ownership, the most effective tools involve acquiring an interest in title of lands through fee-simple purchases, conservation easements or land donations. Land securement is also referred to as greenlands securement.

Land Trust

Non-profit, charitable organizations which have as one of their core activities the acquisition of land or interests in land (like Conservation Easements) for the purpose of conservation.

Local Municipality

The Town of Caledon, City of Brampton and City of Mississauga make up the Local Municipalities of the Region of Peel.

Market Value

The most probable price which a property should bring in a competitive and open market as of the specified date under all conditions requisite to a fair sale, the buyer and seller each acting prudently and knowledgeably, and assuming the price is not affected by undue stimulus.

Implicit in this definition is the consummation of a sale as of the specified date and the passing of title from seller to buyer under conditions whereby:

1. buyer and seller are typically motivated;
2. both parties are well informed or well advised, and acting in what they consider their best interests;
3. a reasonable time is allowed for exposure in the open market;

4. payment is made in terms of cash in Canadian dollars or in terms of financial arrangements comparable thereto;
5. the price represents the normal consideration for the property sold unaffected by special or creative financing or sales concessions granted by anyone associated with the sale.

Natural Heritage Features and Areas

Are features and areas which are important for their environmental and social values as a legacy of the natural landscapes of an area. Natural heritage features and areas may include: wetlands; fish habitat; valleylands; woodlands; habitats of vulnerable, threatened and endangered species; and areas of natural and scientific interest.

Priority Area

Geographic area or areas within Peel identified by a Conservation Partner to focus land securement efforts for the year to protect significant natural heritage features and their ecological functions. Focusing limited securement funds on priority areas results in less duplication of efforts across Peel and assists in strengthening, connecting and protecting the Region of Peel's Core Areas of the Greenland's System.

Priority Area Identified by a Watershed or Subwatershed Study

An area containing significant natural heritage features and functions, that is identified by a watershed or subwatershed study for protection, enhancement and restoration.

Rare Vegetation Community

A community of rare native vegetation species that is not currently at risk of becoming threatened but, because of its limited distribution, small population or specialized habitat needs, could be put at risk of becoming threatened through all or part of its Ontario range by changes in land use or increases in certain types of human activity.

Region of Peel Greenlands System

A functional ecosystem approach to environmental planning recognizes that natural areas exist within a larger more complex system that transcends municipal boundaries. This natural heritage system is made up of natural heritage features and areas, linked by natural corridors which are necessary to maintain biological and geological diversity, natural functions, viable populations of indigenous species and ecosystems. These systems can include lands that have been restored and areas with the potential to be restored to a natural state.

Regional Official Plan

The Regional Official Plan is a public document which provides Regional Council with a long-term policy framework for decision making. It sets the Regional context for more detailed planning by protecting the environment, managing resources and directing growth and sets the basis for providing Regional services in an efficient and effective manner.

Region of Peel Strategic Plan

Is a strategic guidance document that guides Regional Council and staff with community partners in delivering high quality programs and services to the citizens of Peel Region.

Regionally Significant Woodlands

Regionally significant woodlands are defined in the Regional Official Plan as:

1. Rural System woodlands greater than or equal to 16 hectares or in the Urban System greater than or equal to 4 hectares.
2. Any woodland greater than or equal to 4 hectares with:
 - a) significant species or communities (G1, G2, G3, S1, S2, S3), or
 - b) designated by COSEWIC or COSSARO as threatened, endangered or of special concern, or
 - c) the following forest communities: FOC 1-2, FOM 2-1, FOM2-2, FOM6-1, FOD1-1, FOD1-2, FOD 1-4, FOD 2-2, FOD2-3, or FOD 6-2

Significant

Ecologically important in terms of features, functions, representation or amount, and contributing to the quality and diversity of an identifiable geographic area or natural heritage system.

Site Securement Cost

One time short term capital costs required to secure the property to protect the asset and limit liability. This includes costs such as fencing, demolition, or signage.

Threatened and Endangered Species

A species that is listed or categorized as a “Threatened Species” or “Endangered Species” on the Ontario Ministry of Natural Resources and Forestry’s official species at risk list, as updated and amended from time to time.

Valley and Stream Corridors

Are the natural resources associated with the river systems characterized by their landform, features and functions, and include associated ravines. Valley corridors and ravines are distinguished from stream corridors by the presence of a distinct landform.

Water Resources

Water resources in Peel are comprised of complex interrelated systems such as aquifers, groundwater recharge and discharge areas, rivers, streams, ponds, wetlands and lakes. These systems interact through the hydrological cycle which is a combination of precipitation, runoff, percolation, evaporation and discharge.

Well Head Protection Area

The surface and subsurface area surrounding a water well or well field that supplies a public water system and through which contaminants are reasonably likely to move so as eventually to reach the water well or well field.

Wetlands

Lands that are seasonally or permanently covered by shallow water, as well as lands where the water table is close to or at the surface. The four major types of wetlands are swamps, marshes, bogs and fens.

A. Provincially Significant Wetlands

A wetland identified as provincially significant by the Ministry of Natural Resources and Forestry using evaluation procedures established by the Province, as amended from time to time.

B. Locally Significant Wetland

A wetland identified as locally significant by the Local Municipalities within Peel Region.

Section 1: Background

The Greenlands Securement Program allows the Region of Peel to engage in long-term sustainability planning by improving the community's health and social well-being through preservation, protection and enhancement of the natural environment and resources of Peel, thus contributing to a strong regional economy. The Greenlands Securement Program supports the goals and objectives of the Region of Peel Strategic Plan and the Regional Official Plan policies.

In 2005, Regional Council established the Greenlands Securement Reserve and associated capital project in order to provide a sustainable source of funding to help support the land securement efforts of the Credit Valley Conservation (CVC) and the Toronto and Region Conservation Authority (TRCA) as identified in their land securement strategies. In 2006, a subcommittee of Regional Council, called the "Greenlands Securement Subcommittee" (GSSC) was created to provide fiscal oversight for the Greenlands Securement Program and support land securement initiatives in Peel Region. The GSSC was created to help Regional Council to implement a Regional Greenlands Securement Program that is accountable to the citizens of Peel and enhance the efforts of the Region to protect and restore the natural environment in Peel. A list of key resolutions related to development of the Greenlands Securement Program is attached in Appendix I.

Land securement is defined as the protection of key natural heritage features, functions, and attributes using a range of tools, including but not limited to planning policy, stewardship; monitoring; and acquisition through bequests, easements, donations or purchase. Planning policy, stewardship and monitoring should be pursued as the first steps in securement opportunities, after which acquisition may be considered. However, to protect significant natural heritage lands in perpetuity through public ownership, the most effective tools involve acquiring an interest in title of lands through fee-simple purchases, conservation easements or land donations.

To implement the Greenlands Securement Program, the Region entered into Greenlands Securement Agreements with the CVC and TRCA in 2007 to support their specific land acquisition strategies. Since then, the Region entered into agreements with the Bruce Trail Conservancy (BTC) (agreement ended December 1, 2015) and Oak Ridges Moraine Land Trust (ORMLT) until June 28, 2017. These two land trusts focus greenlands securement in the two main geologic features crossing Peel Region: the Oak Ridges Moraine and Niagara Escarpment. Through formal Greenlands Securement Agreements, the Region has worked with these four conservation organizations (Conservation Partners) to conduct land securement activities to identify and protect natural heritage features and areas.

The Region supports the on-going efforts of the Conservation Partners in terms of stewardship, education, monitoring and policy programs. To complement these other programs, the Landowner Outreach - Conservation Easements and Land Donations Program was established to increase land securement activity in strategically targeted areas

throughout Peel Region through landowner education on land donations and conservation easements. This component of the Greenlands Securement Program will assist the Conservation Partners in broadening their land securement efforts in Peel Region.

The Greenlands Securement Program was reviewed in 2010 with all partners as well as outside organisations working in greenlands securement to assess its future implementation. Working in partnership with Conservation Authorities, Land Trusts and Local Municipalities, the initial project has developed into a successful funding program which provides permanent protection to natural heritage features and where appropriate provides public access to natural areas to promote understanding and appreciation of the natural environment. Key elements of the program will continue to guide future land acquisition efforts of the Conservation Partners.

Key Elements:

1. To protect, maintain, and enhance Core Areas of the Region of Peel Greenlands System.
2. To facilitate implementation of the CVC and TRCA land securement strategies aimed towards protecting, maintaining and enhancing natural heritage systems.
3. To target areas not likely to come into public protection through other means.
4. To provide public access where appropriate.
5. To provide a sustainable funding source for land securement and use Regional funding to leverage other funding sources.
6. To work in partnership with CVC, TRCA, ORMLT, BTC, Town of Caledon, and Cities of Brampton and Mississauga to implement greenlands securement.

In June 2014, in recognition that the Region has funding obligations as well as other existing agreements and arrangements in place with TRCA and CVC, Regional Council resolved that the Region limit entering into or renewing Greenlands Securement Agreements with only the TRCA and CVC. This direction provided that upon expiry of the agreements with the Bruce Trail Conservancy and Oak Ridges Moraine Land Trust that applications for funding under the Greenlands Securement Program may be made by or through the TRCA or CVC on behalf of other partners.

In December 2014, Regional Council suspended a number of committees including the GSSC as part of a broader review of Council committees. Upon suspension, Regional Council has assumed the purpose of GSSC to support land securement initiatives in Peel Region.

In June 2015, the Chief Administrative Officer (CAO) for the Region of Peel was authorized by Regional Council to approve individual project funding requests under the Greenlands Securement Program which are less than or equal to \$250,000 in accordance with the 2011 Greenlands Securement Program Implementation Guidelines. Regional Council will continue to consider funding requests greater than \$250,000 and funding requests by a Conservation Partner where the application is being made on behalf of an outside organisation working in greenlands securement to further support the purpose of the Program.

After consultation with partners on the 2014 and 2015 Council directions, Regional Council gave direction to renew Greenlands Securement Agreements with BTC and ORMLT and to

enter into Greenlands Securement Agreements with the Cities of Brampton and Mississauga and the Town of Caledon to improve Program efficiency and enable the direct funding of projects in accordance with the revised Greenlands Securement Implementation Guidelines. The initial intent of the Program to support the greenlands securement strategies of TRCA and CVC remains unchanged as program eligibility for funding continues to focus on their funding purposes. Greenlands Securement Agreements are now in place with the Cities of Mississauga and Brampton, Town of Caledon, Oak Ridges Moraine Land Trust, Bruce Trail Conservancy, Credit Valley Conservation and Toronto and Region Conservation Authority.

Since 2005 there has been 477 hectares (1180 acres) secured through donations of land, conservation easements as well as fee simple purchases. A range of securement tools has effectively used limited Regional funds to leverage Provincial, private and Federal funding programs to permanently secure these lands through a variety of partnerships.

The Region of Peel Greenlands Securement Program will continue to be implemented by the Region through Greenlands Securement Agreements with our Conservation Partners and the Greenlands Securement Program Implementation Guidelines. These documents were developed in consultation with Regional departments, the Conservation Authorities, Land Trusts, and Local Municipalities. The protocols and standards within this document are intended to guide the Region and all partners in the Greenlands Securement Program with preparing, receiving, reviewing, and making recommendations regarding land securement funding applications submitted to the Region.

Section 2: Landowner Outreach - Conservation Easements and Land Donations Program

In 2006, the Region initiated a Landowner Outreach - Conservation Easements and Land Donations Program to complement the Regional Greenlands Securement Program. Through landowner outreach, lands have been secured in key areas of Peel Region, which has generated further interest by other landowners to secure their greenlands.

The purpose of the Landowner Outreach - Conservation Easements and Land Donations Program is to increase land securement activity in strategically targeted areas throughout Peel Region through landowner education, land donations and conservation easements. By focusing on these land securement tools, the program aims to demonstrate an effective and affordable way to develop a strategic approach and delivery system to secure natural heritage features and areas in Peel Region.

The Region has retained the services of a Landowner Outreach Coordinator on a part-time contract basis to work with the Region and its Conservation Partners to elicit interest from Peel residents to donate land or conservation easements and to assist the Conservation Partners to broaden their land securement efforts in Peel. The terms of reference for the Landowner Outreach Coordinator are included in Appendix II.

2.1 Landowner Outreach Contact Process

Appendix III illustrates the landowner contact process for the Landowner Outreach - Conservation Easements and Land Donations Program, which identifies staff responsibilities, major tasks and communication flow. Landowner contact may be undertaken by the Conservation Partner directly or through the Landowner Outreach Coordinator. If a Conservation Partner seeks funding from the Region to secure lands, the funding application process in Section 3 of these Implementation Guidelines will be referred to.

Section 3: Greenlands Securement Program Funding Application

Process

The roles and responsibilities of the Conservation Partners and Region with respect to acquiring significant natural heritage features and areas under the Greenlands Securement Program are outlined in Greenlands Securement Agreements with the Conservation Partners, as amended from time to time and in this section. The following organizations are recognized as Conservation Partners:

- Credit Valley Conservation
- Toronto and Region Conservation Authority
- City of Mississauga
- City of Brampton
- Town of Caledon
- Bruce Trail Conservancy
- Oak Ridges Moraine Land Trust

Conservation Land Trust organizations not listed would require consideration on a case by case basis subject to recommendation by Regional staff and approval by Regional Council.

In addition, the Conservation Partners, Region and Local Municipalities are responsible for carrying out specific tasks throughout the funding request process. Appendix IV includes the process for submitting and reviewing a funding request application made by the Conservation Partners under the Greenlands Securement Program. The process identifies staff responsibilities, major tasks and communication flow.

Sections 3.1, 3.2 and 3.3 describe the roles and responsibilities of the Conservation Partners, the Region and Local Municipalities throughout the Greenlands Securement funding request process. The subsections correspond to the steps within the funding request process as illustrated in Appendix IV. Section 3.4 provides guidance for joint funding requests when a Conservation Authority is proposing to make a request for funding jointly with another Conservation Land Trust organization who does not have a Conservation Partner agreement.

a. Greenlands Securement Stakeholder Working Group

To coordinate efforts and avoid duplication, a Greenlands Securement Stakeholder Working Group comprised of staff from the Region, the Local Municipalities and the Conservation Partners will meet at least once a year to discuss priority areas for securement in Peel and as needed throughout the funding request process. Currently, the Greenlands Securement Stakeholder Working Group includes:

Region of Peel Staff:

- Greenlands Securement Staff Working Group identified below

Local Municipal Staff

- Planning and Real Estate Staff (As required)

Conservation Partner Staff:

- CVC
- TRCA
- ORMLT
- BTC
- City of Mississauga
- City of Brampton
- Town of Caledon

Landowner Outreach Coordinator

The composition of the Greenlands Securement Stakeholder Working Group is subject to change as needed and when appropriate to address specific securement projects and/or initiatives.

b. Greenlands Securement Staff Working Group

To coordinate the efforts of Regional staff, a Regional Greenlands Securement Staff Working Group comprised of staff from Corporate Services (Integrated Planning, Business and Capital Planning, Legal Services) will meet as needed throughout the funding request process. The staff working group provides technical support to Council and makes recommendations to Council on funding requests. The staff working group includes:

- Integrated Planning:
 - Manager, Integrated Planning
 - Planner, Integrated Planning
- Finance:
 - Senior Financial Analyst
- Legal Services:
 - Legal Counsel
- Real Property Asset Management:
 - Supervisor of Real Property
 - Real Estate Expert
- Public Works:
 - Advisor - Environmental

Regional Integrated Planning will provide administrative support to the stakeholder and staff working groups by organizing and facilitating meetings, circulating agendas and meeting minutes and distributing relevant information to the group members.

3.1 Conservation Partner Responsibilities

- a) Conservation Partner staff is responsible for attending at least one Greenlands Securement Stakeholder Working Group meeting per year to identify Priority Areas for land securement in Peel Region. It is recommended that the identification of Priority Areas should be done annually.
- b) Conservation Partner staff has identified two options for eliciting landowner participation in land securement.
 - i. The first option is to continue to work with landowners who have existing relationships with them through stewardship programs. For this option, Conservation Partner staff is responsible for contacting landowners who have or are actively participating in stewardship programs and who they believe may be interested in additional land securement options.
 - ii. The second option identified by the Conservation Partners for eliciting landowner participation in land securement is to contact those landowners that fall within the Priority Areas for land securement that were identified in section 3.1 a). It is the responsibility of the Conservation Partner to collect the appropriate information required to contact these landowners.
- c) Conservation Partner staff undertaking landowner contact for the purposes of the Program shall communicate planned activities to the Greenlands Securement Stakeholder Working Group and coordinate activities where appropriate.
- d) If a landowner is interested in discussing their land securement options, Conservation Partner staff is responsible for arranging meetings with these landowners and providing relevant and appropriate information related to their land securement programs and the Region's Greenlands Securement Program.
- e) After the Conservation Partner identifies a willing landowner, the Conservation Partner will work with Regional Integrated Planning staff to arrange one or more Greenlands Securement Stakeholder Working Group meetings and/or meetings with the appropriate Local Municipal and Regional staff. These stakeholder meetings will allow for the Local Municipality and Region to identify and clarify any potential issues such as land use designations or limitations that may affect the securement project and/or funding opportunities as well as discuss the mandatory "Greenlands Securement Program Appraisal Procedures" outlined in Appendix IX.
- f) The Conservation Partner is responsible for compliance with the "Greenlands Securement Program Appraisal Procedures" in Appendix IX. Non-compliance may impact eligibility under the Program.
- g) Prior to incurring costs, Conservation Partner staff may seek input from Regional Council, by appearing as a delegation, on their securement project to identify and clarify any potential issues prior to submitting a funding request application. Information presented to Regional Council will include as a minimum the environmental value of the property, anticipated future use of the property, a preliminary budget including at a

minimum estimated land value range if the land will be purchased, and anticipated site securement needs.

- h) Once Conservation Partner staff is prepared to seek funding from the Region, they will seek their Board or Council's approval to secure the specific securement project or to approach the Region for funding for the specific securement project. Conservation Partner staff will provide Regional Integrated Planning staff a copy of their Board or Council's resolution to be included in the project file.
- i) Conservation Partner staff will submit their completed funding request application form (Appendix V) to Regional Integrated Planning staff.
- j) A Conservation Authority may submit a funding request application jointly with another Conservation Land Trust Organization for the purposes of achieving its land securement priorities.
- k) If Regional staff requests additional information, Conservation Partner staff will use their best efforts to provide the requested information in a timely manner. Conservation Partner staff can request meetings with the Greenlands Securement Stakeholder Working Group and/or appropriate Regional and Local Municipal staff to clarify any questions or concerns.
- l) Conservation Partner staff will receive a copy of the Regional Council Resolution or Regional CAO decision on their funding request.
- m) If a funding request is approved, Conservation Partner staff can move towards finalizing the securement of the property.
- n) If Regional Council defers a decision for additional information, Conservation Partner staff will use their best efforts to provide the requested information in a timely manner.
- o) If the application is denied, Conservation Partner staff will work with Regional staff to seek approval from Regional Council or the Regional CAO for funding to cover the associated securement costs identified in section 3.1h) and 3.1j).
- p) Properties secured with Regional funding are to be held by the Conservation Partners in perpetuity for conservation.

3.2 Region of Peel Responsibilities

- a) Regional Integrated Planning staff is responsible for organizing at least one annual Greenlands Securement Stakeholder Working Group meeting to identify Priority Areas for land securement in Peel Region. It is recommended that the identification of Priority Areas be done annually.
- b) After the Conservation Partner identifies a willing landowner, the Regional Integrated Planning staff will work with Conservation Partner staff to arrange one or more Greenlands Securement Stakeholder Working Group meetings and/or meetings with appropriate Local Municipal and Regional staff. These stakeholder meetings will allow

the Local Municipality and Region to identify and clarify any potential issues such as land use issues that may affect the securement project, and/or funding opportunities. Regional staff will also use the meetings to provide input into preparation of a market value appraisal and determine the project's eligibility for Regional funding.

- c) Prior to submitting a funding request application, where requested by Regional Council or Conservation Partner staff, Regional Integrated Planning staff will arrange for the Conservation Partner to appear before Regional Council as a delegation to identify and clarify any potential issues of Regional Council with the proposed project. Regional staff may prepare an information report for Regional Council for the meeting. The purpose of this meeting is to allow the Regional Council to provide an indication of support for securing the greenlands and potential limits to the scope of work and cost limits for supporting studies required by the Region. The Regional Council has the option to advise the Conservation Partner staff to not submit a funding application to the Region.
- d) Once a funding request application is received from the Conservation Partner, Regional Integrated Planning staff will review the application for its completeness and circulate the application with supporting documents to the Greenlands Securement Staff Working Group for comments. As part of the review process, Integrated Planning staff will complete a "Greenlands Securement Program Evaluation Form", which is attached as Appendix VI. Upon determination that a funding request application is complete and can be processed with a recommendation, Regional Staff will submit the application and recommendation to Regional Council if the funding request is more than \$250,000 or the Regional CAO if less than \$250,000.
- e) For any funding request representing a total cost to the Region for less than or equal to \$250,000, the application will be provided to the Regional CAO for a decision. The decision of the Regional CAO will be provided to the Conservation Partner using the "Delegated Authority Approval Form" (Appendix X).
- f)
- g) Regional Integrated Planning staff may request additional information from Conservation Partner staff if needed. Regional staff may arrange meetings with Conservation Partner and Local Municipal staff to clarify any questions or concerns.
- h) Upon review of the funding request application, Regional staff may identify the need for additional supporting studies. If this is the case, Regional staff will notify the Conservation Partner and work with them to prepare and include a recommendation for additional studies as part of a report to Regional Council or the Regional CAO.
- i) At a regularly scheduled meeting, Regional Council will review the funding request and make a decision. The Regional CAO can refer any request to Regional Council for consideration at any time, when appropriate. The decisions of the Regional Council will be recorded in the meeting minutes and distributed to the Conservation Partner by Regional staff.
- j) Regional Council or the Regional CAO can refer an application back to Regional staff or Conservation Partner staff for additional information or studies. Once the requested information is gathered, the application with the requested information will be presented to Regional Council or for consideration by the Regional CAO.

- k) If Regional Council or the Regional CAO denies the funding request, Regional Council or the Regional CAO will consider approving funding to cover the associated securement costs identified in 3.2d), 3.2f) and 3.2g).
- l) If after following the “Greenlands Securement Program Appraisal Procedures” (Appendix IX), a project is not completed, the Region will reimburse costs for appraisals and/or environmental site assessments in accordance with Appendix IX.

3.3 Local Municipal Responsibilities

- a) Throughout the funding application process Local Municipal planning staff will be requested to attend meetings with Conservation Partner and Regional staff to discuss securement projects. Local Municipal staff will do their best to attend these meetings and provide comments to Conservation Partner and/or Regional staff when requested.
- b) Local Municipal planning staff may attend the Regional Council meetings. To attend any In-Camera meetings of Regional Council, Local Municipal staff must request to be present during these meetings through the Regional Integrated Planning and Clerks in advance.

3.4 Eligibility of Other Conservation Land Trust Organization Funding Requests

- a) On a case by case basis other Conservation Land Trust Organizations that currently do not have a Greenlands Securement Agreement with the Region, and thus are not identified in the Program as a Conservation Partner, may seek funding under the Region of Peel Greenlands Securement Program.
- b) The eligibility of a Conservation Land Trust Organization may be considered in these cases subject to recommendation by Regional staff and approval by Regional Council.
- c) Upon Regional Council approval the other Conservation Land Trust Organization may submit a funding request to Peel jointly with TRCA or CVC only.
- d) Applications from other Conservation Land Trust Organizations will only be considered in circumstances where the securement of land will achieve the objectives of the TRCA or CVC and Region.
- e) Applications from other Conservation Land Trust Organizations will only be considered if the Land Trust is contributing funds to the securement project.
- f) Applications from other Conservation Land Trust Organizations will be completed in accordance with the purpose and requirements of the Greenlands Securement Program and Greenlands Securement Program Implementation Guidelines following the same application process outlined for Conservation Partners in section 3.1.
- g) The registration or transfer of title to other Conservation Land Trust Organizations will only be considered if the Region, Conservation Authority and Land Trust agree that the Land Trust can provide more effective long term management of the lands than the

Conservation Authority with terms of ownership acceptable to the Region and the TRCA or CVC (see section 6.2). Council approval is required.

- h) Properties secured with Regional funding are to be held in perpetuity for conservation.

Section 4: Preparing a Greenlands Securement Funding Application

As part of their submission to the Region, the Conservation Partners are required to complete the “Region of Peel Greenlands Securement Program Funding Request Application Form”, which is attached as Appendix V. The Application Form may be amended by Regional staff from time to time.

4.1 Funding Eligibility

To be eligible for Regional funding, the subject property must contain at least one of the following natural heritage areas and features:

1. A Core Area of the Region of Peel Greenlands System, which includes:
 - a) Provincially significant wetlands, including coastal wetlands;
 - b) Core woodlands meeting one or more criteria as defined in the Regional Official Plan;
 - c) Environmentally Sensitive or Significant Areas;
 - d) Provincial Life Science Areas of Natural and Scientific Interest;
 - e) Significant habitats of threatened or endangered species;
 - f) Escarpment Natural Areas of the Niagara Escarpment Plan; and
 - g) Valley and stream corridors meeting one or more criteria as defined in the ROP.

Core Areas of the Region of Peel Greenlands System are further defined in the Regional Official Plan and the current version should be referred to for a complete definition.

2. An area identified for securement within the current CVC Greenlands Securement Strategy;
3. An area identified for securement within the current TRCA Greenlands Acquisition Project;

4. Lands that provide the opportunity to protect, restore or enhance natural heritage systems as identified in an approved conservation authority or municipal natural heritage system plan or strategy. The Conservation Partner must be able to demonstrate how securement will establish essential linkages and corridors between natural heritage features. If acquiring lands to be restored, the Conservation Partner must be able to demonstrate, through a restoration plan, or concept for the project, that there is strong potential for restoration or habitat enhancement, and that the securement of lands offers opportunities to buffer or create connections between natural habitats; and
5. A locally significant wetland.

Regional staff will determine funding eligibility in consultation with the appropriate Conservation Partner and Local Municipality.

4.2 Eligible Land Securement Projects

The securement of natural heritage features and areas requires a willing landowner and a suitable project. Provided in Appendix VII, are examples of possible land securement projects that may be eligible for Regional funding if they meet the Region's funding criteria. Other types of projects are not excluded from the Region's consideration. Section 3.4 outlines the eligibility criteria for land securement projects that may be submitted by the TRCA or CVC as a joint application with a Conservation Land Trust Organization that does not have a Greenlands Securement Agreement with the Region.

4.3 Eligible Project Costs

The Greenlands Securement Program is intended to fund costs that would normally be incurred to facilitate the transfer of title or rights to land for a particular project. Project costs are defined within the specific agreement with the Conservation Partner. Examples of eligible costs include:

- title searches
- market value appraisals
- survey
- environmental site assessments
- baseline documentation report
- legal and real estate services
- purchase price
- consent fees

- applicable taxes
- initial signage and fencing
- demolition

Regional Council or the Regional CAO will be advised of the anticipated range of associated securement costs to prepare supporting documents and retain professional services for a securement project. The information will be provided at a regularly scheduled Regional Council meeting described in Section 3.2d) or when the funding request is considered by Regional Council.

Before the Region gives a Conservation Partner approval on a funding request, the Conservation Partner should receive approval from their Board of Directors or Council that it has approved securement of the specific project and has approval to approach the Region for funding for the specific project. The supporting documentation required by the Region for the Conservation Partner to present a potential securement project to Regional Council as described in 3.1e) or subsequently approved by Regional Council will be eligible for Regional funding. If the funding application is not approved, the costs that were incurred by the Conservation Partner which were identified by the Regional Council and were required by the Region (i.e. a market value appraisal) will be reimbursed upon receipt of all relevant supporting documentation.

Approved project costs will be reimbursed upon registration of title to land to the Conservation Partner (or a recipient as agreed to by Regional Council for joint applications) upon receipt of relevant supporting documentation. Approved project costs for studies and professional services for the registration of a conservation easement, excluding real estate costs, for the Oak Ridges Moraine Land Trust will be reimbursed as incurred and upon receipt of relevant supporting documentation.

Where a Conservation Partner has received funding through the Region of Peel Greenlands Securement Program and disposes of all or a portion of the acquired lands in the future, the Region of Peel shall be reimbursed a portion of the sale proceeds equal to the proportion of the Region's contribution towards the purchase cost of the property. The proceeds from the sale of the acquired lands shall be returned to the Greenlands Securement Capital Project. Prior to disposition, the Conservation Partner or Region as appropriate will be given first right of refusal.

4.4 Supporting Documents, Legal Documents and Professional Services

It is anticipated that Regional Council and Regional CAO will require supporting documents as part of any funding request application to the Region made under the Greenlands Securement Program. These supporting documents may include:

- Current Market Value Appraisal
- Phase 1 Environmental Site Assessment

- Title Search
- Survey
- Agreement of Purchase and Sale
- Contract for Legal Services
- Contract for Real Estate Services
- Quote and rationale for fencing

The Background Studies-Standards and Practices Manual (Appendix VIII) and “Greenlands Securement Program Appraisal Procedures” (Appendix IX) should be referred to for minimum standards and practices to be followed for the preparation of documents. Conservation Partner staff are encouraged to consult with Regional staff prior to the preparation of documentation. Documents may be required for submission to Regional staff for review in order to prepare staff reports and recommendations on the funding request.

Studies and legal documents will be completed incrementally and as needed to move securement projects towards completion. The scope of work for each document or service will depend on the property and circumstances at the time of the proposed project.

4.5 Consultation with Regional and Local Municipal Staff

Regional staff is cognizant of not duplicating the efforts of the Local Municipalities in securing environmentally significant lands through the development approval process. Therefore, it is required that the Conservation Partners consult with appropriate Local Municipal and Regional staff prior to submitting an application to the Region in order to discuss opportunities to acquire those lands through the development approval process and to avoid the duplication of securement efforts. This consultation also provides an opportunity for staff to address other issues such as effects on adjacent municipal-owned lands and priorities for the lands to be acquired. The Conservation Partners must also provide a summary of comments received from the Local Municipalities as part of their application submission.

The Conservation Partners are also required to consult with the Local Municipalities, through the Greenlands Securement Stakeholder Working Group, when identifying priority areas for land securement.

Throughout the funding request process, the Conservation Partners are encouraged to consult with the Greenlands Securement Stakeholder Working Group and/or appropriate Regional and Local Municipal staff as needed. Meetings with Regional and Local Municipal staff may be necessary to clarify such matters as land use designations and/or zoning, property ownership or Regional standards for background studies. The Conservation Partners shall be responsible for obtaining legal and real estate services or other professional services to carry out land transactions under the Greenlands Securement Program and are encouraged to consult with Regional staff on the terms of reference for services to ensure that the Region’s needs will be met. Regional Integrated Planning staff

will work with Conservation Partner staff to coordinate such meetings which should ideally be carried out prior to submitting a funding request application.

4.6 Consultation for Funding Requests under Delegated Approval

Where funding requests will be less than or equal to \$250,000, Regional Integrated Planning staff will consult with the Mayor and Regional Councillor representing the Ward in which the property is located prior to a recommendation being provided to the Regional CAO.

4.7 Regional Council Meeting Schedule and Deadlines

Regional Council meetings are generally held twice a month on Thursdays. The schedule is available on the Region of Peel website, or by contacting Regional Staff. Potential securement projects may be presented to Regional Council by a Conservation Partner staff delegation prior to submitting a funding request application. Conservation Partner staff will advise Regional staff of their intention to appear as a delegation to Regional Council.

Funding requests may be submitted to Regional Council for consideration for the remaining capital project funds as opportunities arise. Funding request applications may be required to be submitted to Regional staff a minimum of three months prior to the target Regional Council meeting to allow staff sufficient time to review the application and prepare a recommendation to Regional Council. Conservation Partner staff should present their securement project funding request to Regional Council when the funding request is being considered by Regional Council.

Section 5: Evaluating a Funding Application Form

Appendix VI contains the, “Region of Peel Greenlands Securement Program Evaluation Form”. Regional Integrated Planning staff will complete the evaluation form. Hard copies of all supporting documents and supplementary information will be available for Regional Council or Regional CAO to review through the Integrated Planning Division.

The evaluation form provides guidance to staff when developing recommendations on land securement projects by assigning a score that represents the importance of protecting the property based on its environmental significance, existing policy protection and its contribution to Peel Region. The scoring system in Table 1 is intended to help Regional staff formulate their recommendations.

Table 1: Scoring System for Evaluating Greenlands Securement Projects

Score	What Does this Score Mean?	
≤ 50%	Unimportant	The property does not merit securement
50-60%	Of little importance	There is little evidence to demonstrate the positive value of securing the property
60-70%	Moderately important	There is some evidence to demonstrate the positive value of securing the property
70-80%	Important	The securement of this property contributes to the environmental goals and objectives of the Region and Conservation Partner.
80-90%	Very Important	The securement of this property strongly contributes to the environmental goals and objectives of the Region and Conservation Partner.
90-100%	Exceptionally Important	The securement of this property makes a highly significant contribution to the environmental goals and objectives of the Region and the Conservation Partners due to its exceptional environmental characteristics and the priority for its protection.

As the focus of the Greenlands Securement Program is the protection of significant natural heritage features and areas, and their ecological functions, the evaluation form places an emphasis on a property’s contribution to the Core Areas of the Greenlands System. Properties are also evaluated based on land use factors influencing the need and justification for securing the property as well as the value of securing the property to the Region.

Section 6: Funding Request Decisions and Approvals

When rendering a decision on a funding request application, Regional Council can decide in favour of the application, opposition of the application, or refer the application back to Regional and/or Conservation Partner staff for further information. Regional Council can include conditions as long as the conditions can be carried out in accordance with all applicable legislation and any conditions of registered ownership.

Regional Council has delegated authority to the Regional CAO (or Acting Regional CAO) to approve certain funding requests less than or equal to \$250,000, which is consistent with Regional purchasing policies. Approval authority is identified in Table 2.

The Region may fund up to 50 percent of the required funding, where appropriate, to the Conservation Partners from the Greenlands Securement Reserve to be used to leverage funding from other funding partners in order to offset costs necessitated by land securement transactions. In all instances the Conservation Partner should make every effort to use Regional funds to leverage matching funding from other funding partners. For requests greater than 50 percent of the required funding from the Region, the Conservation Partner must demonstrate the need for the additional funding; the significance of the securement project in relation to the objectives of the Greenlands Securement Program; that best efforts have been made to leverage funding from other agencies; and that options have been considered in the design of the securement project to reduce the Region’s funding share where possible.

The Region is not obligated to provide funding for a project if the Conservation Partner has signed an agreement of purchase and sale or similar legal document. Obtaining written approval for funding requests from the Region prior to commencing sales transactions is preferred.

Table 2: Funding Request Approval Authority

Applicant	Funding Request Amount	Approval Authority
Conservation Partner	Less than or equal \$250,000	Regional CAO
Conservation Partner	Greater than \$250,000	Regional Council

6.1 Procedure for Obtaining the Written Approval of Funding Requests

Regional staff will provide Conservation Partner staff with confirmation of the funding request approval whether it is in the form of a Council Resolution or Regional CAO approval.

6.2 Funding Request Conditions

When a Conservation Partner acquires title to a property where Regional funding has been granted, the Region may require restrictions on the use of the property and/or restrictions on

disposing of all or a portion of the property. These terms and conditions may require a restrictive covenant and/or conservation easement and may include the following conditions:

- a) the lands will be retained in perpetuity for the purposes of protecting significant natural heritage features and areas, and their ecological functions;
- b) allow for passive environmental education and recreation, where appropriate, with the intent of achieving the purpose identified in a);
- c) allow for infrastructure approved through a Federal, Provincial, municipal, or conservation authority environmental assessment process;
- d) does not preclude the requirement for the owner to obtain permits under applicable law;
- e) will require notification to the Region if lands are proposed to be disposed;
- f) if lands are disposed of all or in part, the Region will be reimbursed a portion of the sale proceeds equal to the proportion of the Region's contribution towards the purchase cost of the property; and
- g) grant to the Region gratuitously rights of access, entry, encroachment and/or easement, on under or over the lands as may be required at any time to monitor, maintain, and/or manage existing water and/or wastewater services.

Section 7: Reporting

7.1 Annual Reporting

On an annual basis, Regional staff will report to Regional Council on the following items:

- a) summary of funding applications received;
- b) recommendations made by Council and the CAO on funding requests;
- c) summary of expenditures;
- d) proposed levels of funding for the Greenlands Securement Reserve; and
- e) landowner outreach and education activities.

The Conservation Partners will be responsible for reporting to their Boards of Directors. The Local Municipalities will also be responsible for reporting to their respective Councils.

7.2 Performance Measures

Performance measures are to be developed in consultation with appropriate Regional and Local Municipal staff. The performance measures will be reported on annually and used by Regional staff and Regional Council to monitor the effectiveness of the Greenlands Securement Program. The performance measures should at a minimum report on the following trends:

- Percentage of lands secured (grouped by the securement tool used by the Conservation Partner) within the priority areas identified by the securement strategies of the Conservation Partners;
- Total funding required and the overall cost per hectare;
- Total funding required from the Region and the Regional contribution per hectare;
- Number of unsuccessful projects, total area of the properties, reasons why the projects were unsuccessful, and total expenses;
- Number of successful securement opportunities that did not require Regional funding and area of land secured; and
- Total area of secured natural heritage features and areas (e.g. Provincially Significant Wetlands, significant woodlots, etc.).

Appendices

Appendices are provided for reference purposes and may be amended from time to time. Contact Integrated Planning Division for current version.

Appendix I Key Dates and Council Resolutions

- | | |
|--|--------------------------|
| 2004 | Dec., 2004 RC 2004-1234 |
| <ul style="list-style-type: none"> - Interim Protocol for Land Securement | |
| 2005 | Dec., 2005 RC 2005-1394 |
| <ul style="list-style-type: none"> - Establishment of Greenlands Securement Reserve - Financed as part of Conservation Authority current Budget - Contribution \$500 thousand from Conservation Reserve and amount of funding be determined through 2006 and subsequent budget processes | |
| 2006 | Oct., 2006, RC 2006-1056 |
| <ul style="list-style-type: none"> - Greenlands Securement Subcommittee Terms of Reference - Greenlands Securement Subcommittee to meet in Camera - Contribute \$500 thousand from 2007 budget | |
| 2007 | Feb., 2007, RC 2007-175 |
| <ul style="list-style-type: none"> - Adoption of Greenlands Securement Project Implementation Guidelines | |
| 2010 | Sept., 2010, RC 2010-810 |
| <ul style="list-style-type: none"> - Revision to GSSC Terms of Reference bring forth revised Implementation Guidelines - Consider \$750 thousand contribution in 2011 budget | |
| 2011 | Mar., 2011, RC 2011-191 |
| <ul style="list-style-type: none"> - Approval of amended Greenlands Securement Program Implementation Guidelines | |
| 2014 | Jun., 2014, RC 2014-584 |
| <ul style="list-style-type: none"> - Future Greenlands Securement Agreements only to be with the Credit Valley Conservation Authority and Toronto and Region Conservation Authority | |
| | Dec., 2014, RC 2014-861 |
| <ul style="list-style-type: none"> - Suspension of GSSC pending adoption of 2015-2018 Council Priorities | |
| 2015 | Jun., 2015, RC 2015-450 |
| <ul style="list-style-type: none"> - Delegated approval to CAO for funding request less than or equal to \$250,000 - Requested that staff report back to Regional Council to clarify requirements for joint applications submitted by TRCA and CVC on behalf of other partners. | |
| 2016 | Jun., 2016, RC 2016-497 |
| <ul style="list-style-type: none"> - Amended Greenlands Securement Program Implementation Guidelines approved by Council - Directed staff to enter into Greenlands Securement Agreements with CVC, TRCA, ORMLT, BTC, Cities of Brampton and Mississauga, and Town of Caledon for up to five year terms - Authorized Commissioner of Corporate Services to execute Greenlands Securement Agreements - Delegated approval to CAO for funding requests less than or equal to \$250 thousand | |

Appendix II Landowner Outreach Coordinator Terms of Reference

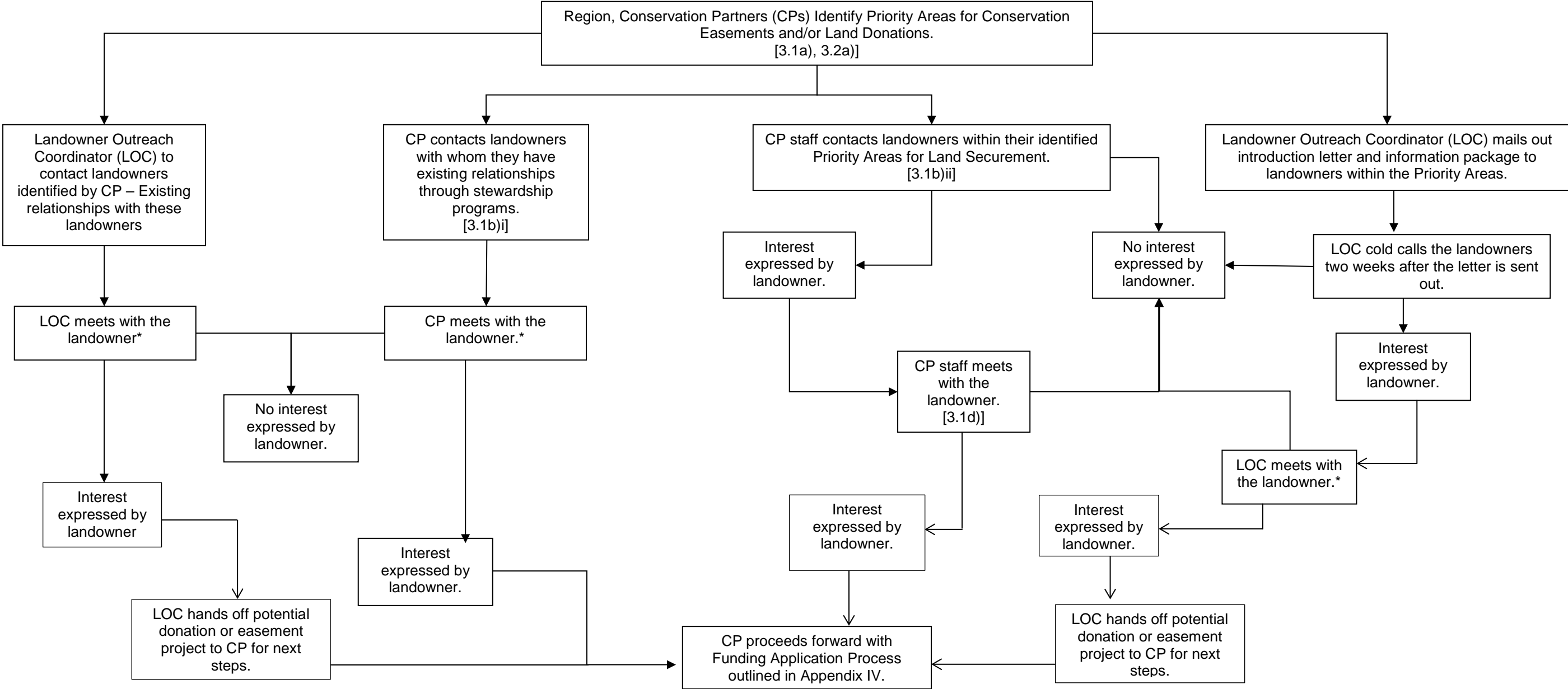
A Landowner Outreach Coordinator has been hired on a part-time contract basis with possible extension to work at arms-length of the Region and its partners to undertake the following:

1. Work closely with staff from the Region of Peel, the Conservation Partners and Local Municipalities to establish priority needs, and coordinate efforts;
2. Engage, inform and work with landowners and community groups on land securement initiatives such as stewardship and acquisition through land donations and conservation easements;
3. Initiate potential donation/easement projects and bring them to the attention of Regional staff and their partners for discussion and further direction;
4. Attend meetings on land securement initiatives as necessary; and
5. Manage donation/easement projects in coordination with key Peel Region staff and partners.

As part of the Landowner Outreach - Conservation Easements and Land Donations Program, the Landowner Outreach Coordinator will undertake the following each year:

1. Identify lands within Core Areas of the Regional Greenlands System or CVC and TRCA land securement strategies with conservation and Local Municipal partners as candidates for donations and conservation easements in Peel Region;
2. Develop a list of landowner contact information for each candidate property and provide landowner contact packages to educate landowners on securement options and other conservation programs of the Region and Conservation Partners which will meet the needs of the conservation and Local Municipal partners;
3. Undertake landowner contact and begin negotiations with landowners interested in donations and conservation easements to meet the needs of conservation and Local Municipal partners; and
4. Coordinate workshops and other activities and events to educate and engage landowners in long-term conservation with the various Peel partners.

Appendix III Landowner Outreach Contact Process

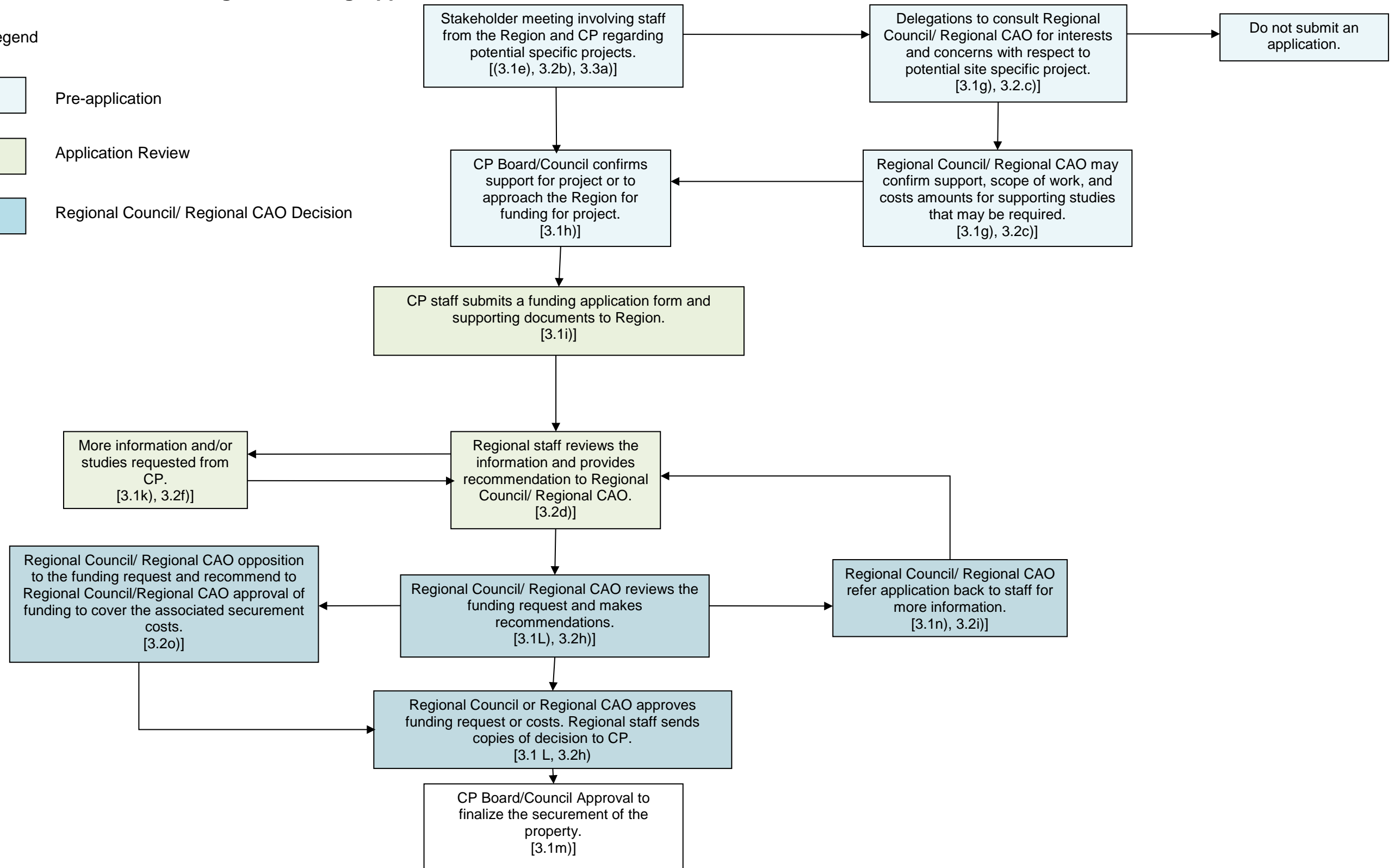


**LOC/CP is reminded that negotiation of property value with a landowner should not commence until the required appraisal is completed to the satisfaction of Regional staff and the Partner. This is accordance with "Greenlands Securement Program Appraisal Procedures" Appendix IX.*

Appendix IV Greenlands Securement Program Funding Application Process

Legend

- Pre-application
- Application Review
- Regional Council/ Regional CAO Decision



Appendix V Greenlands Securement Funding Request Application Form

This form may be amended by Regional staff from time to time. Please contact Integrated Planning Division for the current version.



Office Use Only:	
File Number/Property	
Date Received	

Greenlands Securement Program - Application Form

Funding Request original revised

Instructions: Use the tab button and arrow keys to move through the form fields in the application. Check and uncheck boxes using your mouse pointer.

1. Applicant Information

Property Name
Submitted By: (CVC/TRCA/ORMLT/BTC/Local Municipality)
Estimated Peel Region Funding Requested \$
Agency to take Title
Agency to Manage

Date of Submission	
Contact Name	
Title	
Address	
Postal Code	
Telephone	
Fax	
Email	

2. Application Checklist

Please use the checklist below to make sure your application is complete. Submit the completed application form, appendices and additional documentation in the same order as the checklist.

- 1. Applicant Information
- 2. Application Checklist
- 3. Property Information
- 4. Funding Eligibility
- 5. Securement Proposal
- 6. Signature & Approvals
- 7. Appendices:
 - Project Budget
 - Property Maps
 - Title Search
 - Current Market Appraisal

The following documents are required as part of your application. However, they may be submitted at a later date upon consultation with Regional Staff. Note that successful applicants will be required to provide all of the items listed below before funds can be released for an approved securement project.

8. Additional Documentation:

- a) Phase I Environmental Site Assessment
- b) Property Survey
- c) Draft of Proposed Agreement with Landowner
- d) Comments from the appropriate Local Municipality
- e) Other

3. Property Information

Address		
Legal Description	Lot(s): Town/City:	Concession(s): Regional Municipality: Peel
Assessment Roll Number		
PIN		
Registered Plan		
Reference Plan		
Regional Official Plan Designation(s)		
Local Official Plan Designation(s)		
Zoning		

LANDOWNER INFORMATION

Registered landowner(s):

Telephone:

Email:

When did the landowner(s) acquire the property?

Year:

How did the landowner acquire the property? Purchase Inheritance Other:

Is the property held in Trust? Yes No

Who is the Beneficiary:

Contact Information:

Is the property currently for sale? Yes No

If yes, indicate:

Listing Price: \$

Agent:

Telephone:

Email:

SECUREMENT AREA

Indicate the area of land for the following:

Total Property Size

Acres: Hectares:

If partial acquisition, area to be acquired

Acres: Hectares:

If a partial acquisition, will there be shared access to the property? Yes No

If yes, explain:

Will the partial acquisition create a severance? Yes No

If yes, explain:

Disposition:

SECUREMENT HISTORY

List and describe past negotiations to secure the property and any negotiation details (e.g. past discussions with the owner, past offers, etc.).

APPRAISAL

Has a property appraisal been completed? Yes No

If yes, provide:

Date:

Appraiser:

Current Market Value: \$

PROPERTY CONDITION & USE(S)

Vacant Land Improved Land

Date of last site inspection by the applicant:

Historical land use(s):

Current land use(s):

Proposed land use(s):

Surrounding land use(s):

Proposed surrounding land use(s):

Land use approvals granted by a Conservation Authority/Municipality/NEC (include dates):

Is this property subject to a development application under the Planning Act, Niagara Escarpment Plan, or Conservation Authorities Act?
 Yes No

If yes, explain:

CULTURAL HERITAGE SIGNIFICANCE

List and describe any historical and/or cultural heritage significance related to the property.

BUILDINGS & STRUCTURES

Are there buildings or structures on the property (e.g. residence, barn, outbuildings, ruins/foundations, wells, fences, etc.)? Yes No

If yes, describe type, condition, and current use(s).

Is the building a family residence? Yes No
 Are there tenants in the residence? Yes No
 Is a house inspection required? Yes No

WATER SERVICES

Describe any existing water or wastewater services on the property (e.g. wells, cisterns, storage tanks, etc.).

ENVIRONMENTAL LIABILITIES

List any known environmental liabilities or other adverse property conditions (e.g. contamination, dumping, uncapped wells, dams, etc.).

PROPERTY RESTRICTIONS

List any known restrictions or existing encumbrances on the property (e.g. utility easements).

SURFACE & MINERAL RIGHTS

Does the landowner hold the property's surface and mineral rights? Yes No Unknown

If yes, will all mineral and gas rights to the property be included in the acquisition? Yes No Unknown

Comments:

4. Funding Eligibility

To be eligible for funding, the property must meet specific program criteria. Please indicate the property's funding eligibility below.

a) PRIMARY CRITERIA

The property must meet at least **ONE** of the following criteria to be eligible.

- Core Area of the Region of Peel Greenlands System*
- Area identified for securement in CVC's Greenlands Securement Strategy
- Area identified for securement in TRCA's Greenlands Acquisition Project
- Lands that provide the opportunity to protect, restore or enhance natural heritage systems as identified in an approved conservation authority or municipal natural heritage system plan or strategy. The Conservation Partner must be able to demonstrate how securement will establish essential linkages and corridors between natural heritage features. If acquiring lands to be restored, the Conservation Partner must be able to demonstrate, through a restoration plan, or concept for the project, that there is strong potential for restoration or habitat enhancement, and that the securement of lands offers opportunities to buffer or create connections between natural habitats.
- Locally Significant Wetland(s)

*If any portion of the property is not located with a Core Area of the Region of Peel Greenlands System, provide justification for securing that portion of land:

b) SECONDARY CRITERIA

Additional preference may be given to properties that also meet any of the following criteria.

- Town of Caledon Environmental Policy Area (EPA)
- City of Brampton Official Plan "Natural Heritage Features and Areas"
- City of Mississauga Official Plan "Environmental Areas"
- Niagara Escarpment Plan "Escarpment Natural Area" or "Escarpment Protection Area"
- Oak Ridges Moraine Conservation Plan "Natural Core Area" or "Natural Linkage Area"
- Oak Ridges Moraine Conservation Plan "Key Natural Heritage Features" or "Hydrologically Sensitive Features"
- Designated Wellhead Protection Area
- Priority Area for protection and/or restoration as identified within a Watershed or Subwatershed Study
- Lands that secure a planned trail corridor such as the Bruce Trail or Credit Valley Trail

c) TERTIARY CRITERIA

Additional preference may be given to properties that also meet any of the following criteria.

- Significant cultural/historical resource (e.g. Ossuary)
- Significant habitat for species of conservation concern
- Significant vegetation/forest cover
- Significant wildlife habitat
- Critical fish habitat (e.g. spawning area)
- Regionally rare communities
- Significant water resources (e.g. floodplain, streams, headwater area, source water area, non-evaluated wetland, estuaries)
- Other trail corridor/linkage
- Hazard Lands as identified by Local Municipal Zoning By-Law
- Contiguous to an existing land holding

d) CONSERVATION LINKAGES

Identify abutting conservation lands or any potential linkages with contiguous and/or nearby conservation lands (public and private lands).

e) ECOLOGICAL SIGNIFICANCE

Summarize the ecological significance of the property and clearly list any designations (ANSI, ESA, PSW, etc.) and/or species at risk.

5. Securement Proposal

Conservation Roles

Indicate who will assume the following roles for this project:

Property Title:

Management/Stewardship:

Other:

Securement Method

Indicate the method(s) you will utilize to secure the property (check all that apply):

- Ecological Gift
- Long-term Agreement Lease
 Management/Stewardship Agreement
- Easement/Donation Private Dedication
 Restrictive Covenant
 Conservation Easement
 Testamentary (Will)
 Donation
- Purchase Right-of-First-Refusal
 Option to Purchase
 Life Estate
 Land Trade
 Split-Receipt
 Purchase/Sale Back
 Fee-Simple Estate

Comments:

OBJECTIVES

Please indicate the objective(s) for securing the property with the above-indicated method.

- To allow for the protection and/or restoration of natural heritage lands in perpetuity without purchasing the lands from the landowner.
- To maintain lands in private ownership with restricted public access for conservation purposes.
- To allow for education and monitoring on private lands.
- To allow for the long-term protection of natural heritage lands through a stewardship agreement or legally binding conservation easement without purchasing the lands from the landowner.
- To allow for the landowner to maintain ownership of the lands, but provide management/stewardship and particular use of the property to a public body for the long-term through a legally binding conservation easement.
- To protect in perpetuity, species at risk habitat, public well-head areas, community amenities and educational/scientific resource lands.
- To protect and/or restore in perpetuity significant natural features and/or areas that exist on the property.
- To protect and/or restore natural heritage features and/or areas that are located in areas experiencing high levels of development pressure or are outside the municipal natural heritage policy area.
- To gain public access to natural heritage features and/or areas for education, monitoring, compatible recreation and maintenance.
- To secure a key property that will contribute to a connected corridor of greenspace.
- To secure a planned trail corridor such as the Bruce Trail or Credit Valley Trail.
- To secure lands that provide the opportunity to protect, restore or enhance natural heritage systems approved in a conservation authority or local municipal natural heritage system plan or strategy.
- Other:

--

6. Signature & Approvals

Conservation Partner Signature Section	
Name:	
Title:	
Signature:	

Approval received from your Board of Directors or Council to apply to the Region of Peel for funding?	<input type="checkbox"/> Yes <input type="checkbox"/> No Date of Approval: Resolution Number: If no, provide an explanation:
Have you consulted with the Local Municipality in which the property is located?	<input type="checkbox"/> Yes <input type="checkbox"/> No If no, provide an explanation: If yes, are comments provided by the municipality included with your application (see item F under section 8)? <input type="checkbox"/> Yes <input type="checkbox"/> No If no, provide an explanation:

If Funding Request Application is being made with another Conservation Land Trust Organization or Conservation Partner

Joint application Signature Section: I have read and understand our obligations under the Peel Greenlands Securement Program Implementation Guidelines funding application process and requirements.	
Name:	
Title:	
Signature:	

7. Appendices

Please include the following with your application:

Budget
<ul style="list-style-type: none"> Complete the Peel GSP Application Budget Form provided (Microsoft Excel document) and attach.
Property Maps
Provide maps of the property and surrounding area that includes the following features: <ul style="list-style-type: none"> Orthoimagery

<ul style="list-style-type: none"> • Parcel fabric • Clear delineation of the subject property (if partial acquisition, also indicate area proposed for greenlands securement) • Street network • Core Areas of the Region of Peel Greenlands System • Local Municipal Official Plan environmental/natural heritage land use designations • Priority Areas identified for land securement by the appropriate Conservation Authority through either the CVC Greenlands Securement Strategy or the TRCA Greenlands Acquisition Project • Significant natural heritage features and/or areas (e.g. Provincially Significant Wetlands, Significant Woodlots, Significant Valley and Stream Corridors, etc.) • Delineation of the Conservation Authority Regulation of Development, Interference with Wetlands and Alterations to Shorelines and Watercourses.
Title Search
<ul style="list-style-type: none"> • Provide entire title search for property and attach.
Market Value Appraisal
<ul style="list-style-type: none"> • Provide current market value appraisal

8. Additional Documentation

If available, attach copies of the following documents. Note that successful applicants will be required to provide all of the items listed below before funds can be released.

- Phase I Environmental Site Assessment
- Property Survey
- Property Appraisal
- Draft of Proposed Agreement with Landowner
- Comments from the appropriate Local Municipality

Submission Instructions

Submitting Your Application
<ol style="list-style-type: none"> 1. Complete the Application Checklist on page 1 2. Sign section 6 3. Mail your completed application package to: <p>Heather Hewitt Greenlands Securement Program Integrated Planning Division Corporate Services Region of Peel Planning Department 10 Peel Centre Drive, Suite A, 6th Floor Brampton, ON L6T 4B9</p>
Additional Requirements
<p>Prior to submitting an application, you must obtain approval from your Board of Directors or Council to apply to the Region of Peel for funding. You should also consult with the Local Municipality in which the subject property is located.</p>

Questions?

For further information please contact:

Heather Hewitt, Planner
Region of Peel Planning Department
Telephone 905-791-7800 ext 4083
Email heather.hewitt@peelregion.ca
Website www.region.peel.on.ca

Appendix VI Region of Peel Greenlands Securement Program Evaluation Form

Part I – Applicant and Property Information (To be completed by Regional Staff)

Applicant Information

Conservation Partner	
Address	
Conservation Partner Board or Council Resolution	
Date of Board/Council Resolution	
Requested Regional Contribution	\$

Acquisition Funding Request Form and Property Fact Sheet Checklist

Did the Conservation Partner submit the following information with their application form?

<input type="checkbox"/>	Up-to-Date Phase I Environmental Site Assessment of the Subject Property
<input type="checkbox"/>	Market Value Appraisal of Subject Property
<input type="checkbox"/>	Legal Survey of Subject Property
<input type="checkbox"/>	Search of Title of Subject Property
<input type="checkbox"/>	Draft of Proposed Agreement with Landowner
<input type="checkbox"/>	Staff Comments from Local Municipality

Regional Requirements Checklist

<input type="checkbox"/>	Applicant has satisfied all Regional requirements/standards to qualify for Regional land securement funding
<input type="checkbox"/>	Sufficient funds are available through the Greenlands Securement Capital Project

Property Information

Local Municipality	
Property Address	

Legal Description	
Size	
Existing Buildings	
Water and/or Wastewater Services	
Present Land Use(s)	
Proposed Land Use(s)	
Existing Encumbrances/ Easements/Restrictions	
Date of Last Site Inspection	
Regional Official Plan Policy Area	
Local Municipal Plan Land Use Designation	
Local Municipal Zoning	
Appraised Market Value(s) and Date(s) of Appraisal(s)	
Agency to hold title of the lands	
Agency to manage the lands	
Adjacent Park(s)/Conservation Area(s)	
Existing Trails	
Land Owner Contact Information (i.e. Mailing address, phone number,	

fax number, email address)	
----------------------------	--

Part II – Property Evaluation (To be completed by Regional Staff)

This section examines the benefits of securing the property in relation to the Regional Greenlands System and the Region of Peel. This is accomplished by assigning numeric values to the various property attributes and summarizing the total scores.

Contribution to the Regional Greenlands System

i) Priority Natural Heritage Features and Areas

Property Attributes	Attribute Value Yes = 10 No = 0	Staff Comments
Includes a Core Area of the Regional Greenlands System		
Is identified for securement by the Conservation Authorities through their securement strategy		
Includes a locally significant wetland		
Total	/30	

ii) Other Natural Heritage Features and Areas

Property Attributes	Attribute Value Yes = 2 No = 0	Regional Staff Comments
Includes locally significant features and/or areas other than wetlands		
Includes regionally rare vegetation communities		
Is designated a well head protection area in the ROP and/or Local Municipal OP		
Includes significant water resources		
Is a Priority Area as identified by a watershed or subwatershed study		
Total	/10	

Land Use Factors

For evaluating the Land Use Factors contributing to the importance of securing the property, use the following attribute scale:

Strongly Disagree	Disagree	Somewhat Agree	Agree	Strongly Agree
1	2	3	4	5

Property Attributes	Attribute Value 1 to 5	Regional Staff Comments
Land cannot be secured through the Planning Act (i.e. gratuitous dedication or conveyance)		
Significant natural heritage features and functions are not protected by Regional/Local Municipal/Provincial land use policies and therefore could be developed		
Existing and/or potential trail or corridor linkage		
Has easy public access		
Is contiguous to an existing park/conservation area		
Proximity to Settlement Area/Urban Area		
Total	/30	

Value to the Region of Peel

For evaluating the value of securing the property to the Region of Peel, use the following attribute scale:

Strongly Disagree	Disagree	Somewhat Agree	Agree	Strongly Agree
1	2	3	4	5

Property Attributes	Attribute Value 1 to 5	Regional Staff Comments
Supports ROP Natural Environment Policies		
Supports Region of Peel Term of Council Priorities		
• Partners are available to help fund capital costs		
Landowner wishes to give/donate land and/or		

conservation easement		
The level of funding requested from the Region to cover necessary costs for securing the property is appropriate		
Partners are available to help with the long-term management of the property		
Total	/30	

Summary Totals

Contribution to the Regional Greenlands System: Priority Natural Heritage Features and Areas	/30
Contribution to the Regional Greenlands System: Other Natural Heritage Features and Areas	/10
Land Use Factors	/30
Value to the Region of Peel	/30
Total	/100

Appendix VII Examples of Eligible Land Securement Projects

Project	Definition
Stewardship Projects	
Lease	Can be a short term, long term, lease-to-own, lease-for-life, or leaseback agreement. This option may be used if the landowner is unwilling to sell, if the purchase price is too high, or as an interim measure while funds are raised to purchase the property.
Management Agreement	Wide variety ranging from informal to more formal and legally binding license agreements. In some cases the CAs may provide the technical and financial assistance while the landowner agrees to follow certain restrictions for use of the land. Can be in the form of fishery, wetland and forestry agreements.
Land Acquisition Projects - Easement or Donation	
Private Dedication	A private landowner dedicates land in perpetuity for conservation purposes. Could result in tax benefits.
Restrictive Covenant	Places restrictions on the use of the property. Can be donated or purchased. If lands are donated then there may be a possibility for tax benefits for the landowner.
Conservation Easement	A landowner retains ownership of the property but allows restrictions to be imposed against the lands and are registered against the property so to be binding on all subsequent owners, thereby, establishing long-term protection. Conservation easements can be purchased or donated and may result in tax credits to the landowner.
Testamentary (Will)	A bequest of land to a conservation foundation written up in a legal will. May result in favourable tax treatment to the Testator and/or the Estate.
Donation	A gift of land to a conservation organization (i.e. CVC Foundation). May receive tax benefits for the market value of “ecologically sensitive land” (Ecological Gifts Program) or other programs available from time to time.
Land Acquisition Projects - Purchase	
Right-Of-First-Refusal	A landowner expresses the desire to sell their land at some point in the future. The landowner must offer to sell the property to the Conservation Partner at the same price as the landowner has been offered by a third party prior to sale of the lands to that third party. It is a chance to match an offer on the property before proceeding with a sale.
Option to Purchase	The landowner agrees to sell the property at a future date to the Conservation Partner in consideration of a payment in the present to secure the Conservation Partner’s ability to purchase at a future date for a price to be determined at that future date.
Life Estate	A landowner donates or sells their land, yet retains entitlement to use the land within the restrictions of the life-estate agreement. An estimate is made of the value of the use of the land and subtracted

Project	Definition
	from the fair market value of the property at the time of purchase. The net amount is the purchase price for the property. May result in favourable tax treatment for the landowner.
Land Trading	Lands that no longer fulfill current objectives and priorities are traded or exchanged for more desirable lands.
Split Receipting	The property is sold to the Conservation Partner at a reduced price with the remainder of the fair market value of the property resulting in a charitable gift to the Conservation Partner.
Purchase/Sale Back	Purchase of an entire property on the open market to protect the ecological function located on the piece of land. Sections may be severed and the remaining lands may be sold. Local policy may limit the ability to sever off and dispose of lands (i.e. natural heritage severances should not result in the creation of new residential lots).
Fee-simple Estate	Outright purchase of a property and transfer of legal title.
Partial Taking or Conservation Severance	A portion of the property is acquired by the Conservation Partner for the purposes of enhancing, protecting, or maintaining environmentally sensitive lands, while leaving a smaller lot area with the landowner. This can be accomplished either under section 50 (3) (e), <i>Planning Act</i> or through consent to sever by a municipality.

**Appendix VIII Background Studies-Standards and Practices
Manual**



**Region of Peel
Greenlands Securement Program**

**Background Studies –
Standards and Practices Manual**

2016

Table of Contents

Section 1	
Background.....	1
Section 2	
Survey and Reference Plan.....	3
2.1 Facsimile – Request for Quotation.....	4
2.2 Supplement to Request for Legal Survey – Reference Plan	5
Section 3	
Market Value Appraisal	7
3.1 Schedule “A” – Agency Appraisal Requirements.....	8
Section 4	
Phase I Environmental Site Assessment (ESA).....	14
4.1 Terms of Reference Template for Phase I ESA	15
4.2 Terms of Reference Template for Phase I ESA – “Appendix I”	18

Section 1: Background

The Greenlands Securement Program allows the Region of Peel to engage in long-term sustainability planning by improving the community's health and social well-being through preservation, protection and enhancement of the natural environment and resources of Peel and contributing to a strong regional economy. Greenlands Securement is defined as the protection of key natural heritage features, functions and attributes using a range of tools, including but not limited to planning policy; stewardship; monitoring; and acquisition through bequests, easements, donations or purchase. Planning policy, stewardship and monitoring should be pursued as the first steps in all securement opportunities, after which acquisition may be considered. Through Council Resolution 2005-1394, Regional Council established the Greenlands Securement Reserve and Land Securement Capital Project to help support greenlands securement efforts in Peel Region.

The "Greenlands Securement Program Implementation Guidelines" outlines protocols and standards to guide the Region, Conservation Partners, and Local Municipalities in preparing, receiving, reviewing and making recommendations regarding greenlands securement funding requests that are submitted to the Region.

The Implementation Guidelines state that Council can request background studies to be completed as part of a greenlands securement funding request that is submitted to the Region of Peel. The "Greenlands Securement Program Background Studies – Standards and Practices Manual" contain the minimum standards and practices that need to be followed in order to satisfy the Region's funding application requirements under the Greenlands Securement Program.

Please direct questions related to this standards and practices manual to:

Heather Hewitt
Planner, Integrated Planning
Region of Peel
10 Peel Centre Dr., 6th Floor
Brampton, ON L6T 4B9
Heather.hewitt@peelregion.ca
Tel: (905) 791-7800 ext 4083

Section 2: Survey and Reference Plan

2.1 Facsimile – Request for Quotation

[month, day, year]

VIA FACSIMILE

REQUEST FOR QUOTATION

Proposed Reference Plan(s)

Please provide a quotation for the preparation of the required Reference plan(s) to show the proposed property in the [**INSERT MUNICIPALITY LOCATION**], as per the supplied sketches.

The successful vendor will receive a Microstation file(s) of the existing cadastral area, or other file used to create the sketch. It is to be used for information and as a seed file for the required Microstation digital plan. Please note that [**INSERT NUMBER AS REQUIRED**] draft plans will be required as per the owner configurations included in the attached supplement and graphically shown on a separate PDF file to be emailed to each prospective vendor.

Review the supplied documentation carefully and submit a quotation to the undersigned on or before [**DATE**] by **12:00 noon**. A quotation received after this deadline is not considered. Quotations may be hand delivered, or faxed to me directly at **(905) [FAX NUMBER]** No verbal quotations accepted.

The draft plan(s) is required on or before [**DATE**] by **12:00 noon**.

If you have questions regarding this assignment, please call me at **(905) [NUMBER] ext.**

Respectfully,

cc. Purchasing
Encl.

2.2 Supplement to Request for Legal Survey – Reference Plan

Region of Peel Greenlands Securement Program

SUPPLEMENT TO REQUEST FOR LEGAL SURVEY – REFERENCE PLAN

1. The attached plan is only a guide to show the proposed limits of the land required. The plan does not represent the exact parts and number of parts, as they would appear on the final Reference Plan.
2. The attached only indicates the lands required by the [Name of Agency] for:
Proposed Property Requirements
3. Prior to submitting a quote on the specific project, the Surveyor should apprise themselves of:
 - The number of owners affected by the [Name of Agency] requirements, which will be separate parts on the Reference Plan (if more than one owner involved).
 - Owners, easements, rights of way, and any other encumbrances, which are on title and will be required to be shown as separate parts on the Reference Plan.
 - Anything else which could require separate parts on the Reference Plan.
4. The Schedule on the Reference Plan must include:
 - Part number
 - Grantee/Owner
 - Lot number
 - Concession/plan reference
 - Instrument number
 - Easements affecting part and related instrument number
 - Areas of all parts (square metre unless otherwise noted)
5. The Surveyor is required to include in the quotation, the cost of depositing and providing a duplicate Mylar(s), as well as supplying white prints (10), and digital files on CD of the final deposited plan(s).
6. Prior to depositing the Reference Plan(s), the plan must be approved by the [Agency Name]. Ten (10) white prints of the preliminary plan(s) must be submitted to the [Approval Authority for the Agency, (e.g. Supervisor of GIS)] as to undertake this procedure.
7. Plan scale shall be at the Surveyor's discretion unless otherwise noted on this form.

Required Scale: **Not to exceed 1:1500**
8. Special requirements are as follows:

- ☑ Digital file of final plan(s) required in Microstation DGN format, as per the supplied file.
- ☑ All Survey monuments planted in farm and agricultural fields are to be buried at least 0.6 metres below the existing ground level. All survey monuments planted in lawn areas are to be buried at or below the ground level as not to impede lawn maintenance.
- ☑ Winter work conditions are anticipated and should be considered in the quotation price. No additional extra costs for work will be considered because of winter weather conditions.
- ☑ When providing your quotation, provide a *provisional* cost for staking the limits of the proposed property requirements prior to depositing the plan. This cost should be shown separately on your quotation. If the [Agency Name] does not utilize this provisional service, then it will not be considered for invoicing.

Section 3: Market Value Appraisal

3.1 Schedule “A” – Agency Appraisal Requirements

Region of Peel Greenlands Securement Program

Schedule “A”

AGENCY Appraisal REQUIREMENTS

Conservation – Partial Taking (Easement), Buyouts

The Agency requires that **ALL** information outlined below **MUST** be contained in the appraisal, in addition to the requirements of CUSPAP. Verbiage listed as “**required wording**” must be used verbatim in the appraisal report. Reports that do not include all of this information will not be accepted by the Agency.

1. Title Page
2. Letter of Transmittal including a statement of any hypothetical conditions, extraordinary assumptions and extraordinary limiting conditions invoked
3. Table of Contents
4. Executive Summary of Salient Facts and Conclusions
5. Effective Date
6. Terms of Reference and Definition of the Appraisal Problem
7. Purpose of the Report: **required wording**
 - (a) *The purpose of the appraisal is to establish the fair market value of the donation for the issuance of a tax receipt under the Income Tax Act*
 - Or
 - (b) *The purpose of the appraisal is to estimate the FAIR MARKET VALUE of the lands located on the (insert property address) for the purpose of determining fair compensation for the purchase of the property by the (insert agency name).*
8. Intended Use of the Report: **required wording**
 - (i) *Easement*
“The intended use of this appraisal is to assist the (insert agency name) in determining the total amount payable to the owner and any other ownership interests in the subject property as full compensation for any loss in market value sustained as a result of the taking(s).”

(ii) *Buy-out*

“The intended use of this appraisal is to assist the (insert agency name) in determining the amount payable to the owner and any other ownership interest of the subject property as fair compensation for the purchase of the property.”

9. Environmental Significance on Subject Property
10. Ownership and Sales/Listing History of Subject Property
11. Legal Description Including any Encumbrances and Covenants
12. Mortgage Data
13. Lease Details (if leased)
14. Assessment Roll Number, Assessed Value and Annual Taxes
15. Property Rights Appraised: **Note:** The appraisal report shall refer to the property owner’s overall property or larger parcel as the **“Subject Property”** and the taking of a permanent easement or other interest shall be the **“Taking”**.
16. Scope of Work: In addition to all CUSPAP items, the Scope of Work contained in the appraisal report must include the following items:
 - Inspected and photographed the property most recently on (*date*)
 - Property data including site and building areas was obtained by a personal inspection of the subject, review of the assessment roll, registry abstract, (*examination of the site plan, leases, etc.*)
 - Reviewed drawings describing the “Buyout” or the “Taking” as provided
 - Considered the development trends, economic and real estate market conditions in relation to the subject existing as of the effective date; reviewed and analyzed the sales history of the property
 - Considered the physical, functional and economic characteristics of the property
 - Municipal data was obtained from various sources including government publications, municipal economic development departments and real estate publications
 - Completed a subsearch of the property **and examine relevant documents** noted in the Parcel Register
 - The municipality’s Official Plan, Secondary Plan, Zoning By-Laws and all other relevant and applicable planning and development restrictions were reviewed to determine the site designations and regulations regarding development of the property
 - Determined municipal services available to the property
 - The permitted uses within the property’s zoning were investigated, as well as the regulations governing development (including minimum lot sizes, setbacks and parking requirements)
 - Considered and analyzed the Highest and Best use of the property

- Conducted market research with regard to comparable sales, (*lease rates and overall capitalization rates, etc.*) for (*commercial, residential etc.*) developments in the (*Municipality*) and surrounding areas
- Sales data was obtained from the local real estate board, (*Realtrack, Geowarehouse, Marsh etc.*) and discussions with real estate agents, other appraisers and our files. The relevant sales have been examined and inspected and the circumstances surrounding these sales were confirmed with at least one party to the transaction where possible.
- In considering the purpose and intended use of the appraisal, we utilized the Direct Comparison (*Income, Cost*) approaches to value
- After assembling and analyzing the data, a final estimate of value was made

THE AGENCY HEREBY ADVISES the Vendor that no statement in the report can relieve the Vendor of their obligation to examine the Parcel Register for the subject property and the relevant instruments contained therein. Further, no statement in the report can limit the Vendor's obligation to note and consider any planning restrictions or restrictions on title that a reasonable appraiser would note and consider in their valuation. Should any such limitations be contained in the appraisal report the Vendor hereby agrees that they are invalid and the requirements of this document shall prevail.

17. Definition of Market Value: **required wording**

The most probable price which a property should bring in a competitive and open market as of the specified date under all conditions requisite to a fair sale, the buyer and seller each acting prudently and knowledgeably, and assuming the price is not affected by undue stimulus.

Implicit in this definition of market value are elements requisite to a fair sale. These intrinsic components include:

- 1) buyer and seller are typically motivated;*
- 2) both parties are well informed or well advised, and acting in what they consider their best interests;*
- 3) a reasonable time is allowed for exposure in the open market;*
- 4) payment is made in terms of cash in Canadian dollars, or in terms of financial arrangements comparable thereto; and*
- 5) the price represents the normal consideration for the property sold unaffected by special or creative financing or sales concessions granted by anyone associated with the sale."*

18. General Area and Economic Analysis

19. Neighbourhood Analysis

20. Map of Neighbourhood

21. Land Use Controls: must include discussion and analysis of Official Plan, Secondary Plan, Zoning, Niagara Escarpment Plan, Conservation Authority (floodplain), Greenbelt, Places to Grow, Oak Ridges Moraine, Parkway Belt, restrictive covenants and any other applicable regulations on the Subject Property. Maps of all applicable

controls must be included, preferably in the Addenda. The property must be discussed with all land use agencies.

22. Municipal Services and Access Available to the property

23. (a) Property Site Analysis (Permanent Easement)

- Photographs
 - Front view of Subject Property
 - Street Scene- each direction
 - Taking – each direction - photos must show all improvements located within the taking
- Sketch of Subject Property showing the Taking and all improvements within the Taking

(b) Buyout Analysis

- Photographs
 - Front View of Subject Property
 - Rear View of Subject property
 - Various significant pictures throughout the property
 - Street Scene
- Sketch of property and all improvements located on the property.

24. Description of Property Improvements

25. Effects of Taking on Subject Property: include a detailed description and analysis of the effects the taking(s) will have on the Subject Property and any improvements thereto, along with a description of the Subject Property site after the Taking. If applicable include discussion of the easement rights being taken and their effect on the Subject Property (Easement Only)

26. Analysis of Highest and Best Use of Subject Property

- As if vacant
- As improved

27. Discussion of Effect of Taking on Highest and Best Use of Subject Property (Easement Only)

28. Discussion of appropriate Approaches to Value: Cost Approach, Income Analysis, Direct Comparison Approach

29. Completion of appropriate Approaches to Value: Cost Approach, Income Analysis, Direct Comparison Approach

- (i) In the Direct Comparison Approach each land use must be individually valued, no blended rates will be allowed within the report.

30. Map of comparable sales in relation to property

31. Comparable Sales Analysis: Each comparable sale **MUST** be summarized on a separate page and contain the following information:

- Property Identifier Number (PIN)
- Vendor/Purchaser
- Date of Sale
- Date of Transfer and Instrument Number
- Size of Lands and Size of Improvements (if applicable)
- Sale Price
- Sale Price per Unit
- Official Plan Designation and Zoning
- Municipal Services
- Brief description of pertinent information
- Location sketch
- Photograph

These individual comparable sales summaries should be located in the Addenda of the report

32. Sales Adjustment Chart/Table **MUST** be included and must be in a spreadsheet format and include the Subject Property information at the bottom for reference

33. Written analysis of each comparable sale including explanation of all adjustments in comparison to the Subject Property. Must be detailed enough to lead the reader to the appraiser's conclusions

34. Exposure Time

35. Reconciliation of Approaches to Value

36. Estimate of market value of the (Taking) Subject Property (Easement only)

37. Statement of Total Loss in Value to the Subject Property as a Result of the Taking: In accordance with the Purpose of the report, it must end with a statement of the total estimated the loss in market value sustained by the Subject Property as a result of the Taking (easement taking)

38. Assumptions and Limiting Conditions

39. Certification

40. Currency should be in Canadian Dollars

Supporting Data that must be included in the Addenda

- Individual Sales Summaries
- Copy of title information (parcel register, transfer/deed)
- Copy of draft reference plan
- Official Plan, Zoning and other maps showing Subject Property Boundaries Clearly Illustrated
- MLS sales information supporting time adjustments (if applicable)

- Additional photographs (if required)
- Appraiser's Qualifications

COMPLETED REPORT

A Portable Document Format (PDF) Version must be submitted electronically with three (1) coloured, printed copies of the Completed Appraisal Report.

Section 4: Phase I Environmental Site Assessment (ESA)

4.1 Terms of Reference for Phase I ESA

Region of Peel Greenlands Securement Program

Terms of Reference Template for Phase I Environmental Site Assessment (ESA) Report

1. Purpose

[Agency Name] requires a Phase I Environmental Site Assessment (ESA) report as a due diligence investigation in support of the [insert whether purchase, land donation, conservation easement or specify another acquisition tool] of the “[X] Property” described as [short legal description of subject lands]. The [Agency Name] wishes to acquire “[X] Property” to protect, preserve and enhance the natural heritage features, areas and functions on the Property and to ensure that the subject lands are free of all negative environmental issues. The purpose of the proposed work is to confirm the environmental condition of the subject property and identify any negative environmental issues that may be present on the property.

Users of the Phase I ESA report will include Region of Peel employees, and the [Agency Name] and its employees. The report may be disclosed to the owner of the “[X] Property” by the [Agency Name].

2. Scope of Work

Work for this project will be guided by the “Protocol for Phase I Environmental Site Assessment” set out in these Terms of Reference, which are adapted from the Canadian Standards Association (CSA) Standard Z768-01 – *Phase I Environmental Site Assessment, November 2001*, as updated. These Terms of Reference must be attached as an appendix to the Phase I ESA report to document the scope of work for the Phase I ESA. The report must also include a map as an appendix that shows the boundaries of the subject lands, including the retained lands in the case of a partial taking; significant structures; and locations of on and off-site issues that may require a Phase II ESA report. To be consistent with O.Reg 153/04 map should show site and properties within a 250m radius.

Protocol for Phase I Environmental Site Assessment

- 2.1.1. The consultant must conduct a Phase I ESA in accordance with:
 - a) the Canadian Standards Association (CSA) Standard Z768-01 – *Phase I Environmental Site Assessment, November 2001*, as updated; and
 - b) the technical requirements of the *Environmental Protection Act – O. Reg. 153/04, Records of Site Conditions*, as amended.
- 2.1.2. In addition to a site visit and interviews, the site history and records review shall, at a minimum include the following sources:

- a) Aerial photos from the National Air Photo Library, Region of Peel, relevant Conservation Authority or relevant Local Municipality (Town of Caledon, and Cities of Brampton and Mississauga);
- b) Street Directories;
- c) Ministry of Natural Resources – Ontario Base Map;
- d) Energy Mines and Resources – Topographical Map;
- e) Applicable Soil and Geological Map; and
- f) A Search of Title for the Subject Property.
- g) Review of available Fire Insurance Plans.

The consultant must document in the draft and final reports if any of the above sources were not readily available.

2.1.3. Minimum regulatory contacts and databases that shall be contacted or accessed are:

- a) Technical Standards and Safety Authority;
- b) Appropriate Regional and Local municipal departments, such as Public Works and/or Planning;
- c) Ontario Ministry of the Environment and Climate Change – Freedom of Information;
- d) Ontario Ministry of the Environment Databases from Ecolog Environmental Risk Information Service Ltd. (ERIS), including;
 - i. Water Well Information System;
 - ii. PCB Site Inventory;
 - iii. Waste Disposal Site Inventory;
 - iv. Spills Inventory;
 - v. Waste Generators/Receivers;
 - vi. Compliance and Convictions;
 - vii. Pesticide Sites;
 - viii. Occurrence Reporting Information System; and
- e) Additional contacts and databases as applicable to the current or past use of the site.

3. Format for Phase I ESA Report

The Phase I ESA report shall be in the format identified in Appendix I of these Terms of Reference.

4 Deviations and Limitations

The Phase I ESA report shall state if there have been any deviations from the principal components of the “Protocol for Phase I Environmental Site Assessment”, as described in these Terms of Reference, and the reasons for any deviations. In addition, the consultant shall report all limitations encountered in the Phase I ESA. The report must describe those tasks that were not performed due to limiting conditions.

5 Recommendations for Phase II ESA

Should the Phase I ESA report conclude positive results for negative environmental issues affecting the property, the consultant may recommend further steps in accordance with the (CSA) Standard Z768-01 – *Phase I Environmental Site Assessment, November 2001*, as updated, which may include a Phase II ESA (contaminant assessment). A recommendation for a Phase II ESA must be made in the form of a separate reporting letter to the [Agency Name] from the consultant and shall include:

- a) Appropriate steps for further investigation;
- b) Proposed methodology;
- c) Budget; and
- d) Should such a letter be necessary, recommendations should be organized into two groups: those that are driven by regulatory compliance and those that are not.

4.2 Terms of Reference for Phase I ESA – “Appendix I”

Appendix I Phase I Environmental Site Assessment (ESA) Report Format

Executive Summary

Reporting Letter [signed and dated by Consultant]

Reporting Letter with Recommendations for Phase II ESA [if needed – signed and dated]

1. Introduction

2. Scope of Work

3. Site Overview

- 3.1. Site Description
- 3.2. Building Description(s)
- 3.3. Utilities and Building Services

4. Records Review

- 4.1. Aerial Photographs
- 4.2. Property Use Records (City directories and Fire Insurance Plans)
- 4.3. Title Search
- 4.4. Review of Previous Reports
- 4.5. Property Management Records
- 4.6. Review of Maps (Geologic, Topographic, Hydrogeologic, Floodplain, etc.)

5. Regulatory Review

- 5.1. Site Regulatory Information (from Site Representative regarding permits, approvals and registrations)
- 5.2. Ontario Ministry of the Environment and Climate Change Freedom of Information Request
- 5.3. Municipal Records
- 5.4. Technical Standards and Safety Authority
- 5.5. EcoLog ERIS

6. Site Visit

- 6.1. General [Date, time and methodology]
- 6.2. Property Use(s)
- 6.3. Observations of Adjacent Properties
- 6.4. Hazardous Materials
- 6.5. Unidentified Substances
- 6.6. Above Ground Storage Tanks
- 6.7. Underground Storage Tanks
- 6.8. Storage Containers
- 6.9. Stains and Odours

- 6.10. Potable Water Supply
 - 6.11. Special Attention Items [PCBs, ACMs, ODSs, Radon, Mould or Microbial Contamination – reported in subsections]
 - 6.12. Air Emissions
 - 6.13. Heating and Cooling
 - 6.14. Drains and Sumps
 - 6.15. Wells
 - 6.16. Sewage Disposal
 - 6.17. Pits and Lagoons
 - 6.18. Wastewater
 - 6.19. Watercourses, Ditches or Standing Water
 - 6.20. Fill Materials
 - 6.21. Stressed Vegetation
 - 6.22. Roads, Parking Facilities and Rights of Way
- 7. Interviews** [Report purpose of interview, people/personnel interviewed and content of the interview]
- 8. Findings**
- 9. Evaluation of Findings/ Recommendations**
- 10. Conclusions**
- 11. Qualifications of the Assessor and Report Date**
- Appendices** [Appendices must contain all supporting information including: photography, mapping, regulatory correspondence, aerial photographs, contracts, etc.]

Appendix IX Greenlands Securement Program Appraisal Procedures

1. In accordance with Sections 3.1e) and 3.2b) of the Greenlands Securement Program Implementation Guidelines, in cases where the Conservation Partner intend to make an application for funding from the Greenlands Securement Capital Project, the Conservation Partner shall meet with Regional staff at a Stakeholder Working Group or other arranged meeting to review the particulars of the real property to be appraised/acquired, to discuss retaining an appraiser and, to agree on the appropriate terms of reference necessary for an appraisal in support of the funding request.
2. In order to ensure that negotiations are informed by an independent appraisal, negotiations with prospective landowner participants of the purchase price for the actual securement should not commence until the required appraisal is completed to the satisfaction of Regional staff and the Conservation Partner. In order to determine landowner interest in greenlands securement options before incurring costs to prepare appraisals, it may be necessary to provide examples of prices paid through the Greenlands Securement Program (“The Program”) in previous transactions. In such instances, prospective landowners shall be advised that prices associated with previous transactions are not the basis for price negotiations for current projects and that project funding shall only be based on a current market value appraisal satisfactory to the Region, Conservation Partner and landowner.
3. Prior to ordering any appraisal to be used in a Program funding request, Regional staff and the Conservation Partner shall agree upon:
 - the list of qualified appraisers acceptable to the Region and Conservation Partner,
 - that the appraisal shall name both The Regional Municipality of Peel and the Conservation Partner as the Client in the report,
 - the Purpose and the Intended Use of the appraisal,
 - any Hypothetical Conditions, Extraordinary Assumptions, Extraordinary Limiting Conditions, and other “property specific” terms of reference to be used in the appraisal, and
 - any encumbrances on title to the property that shall be addressed in the appraisal,

all in accordance with the Canadian Uniform Standards of Professional Appraisal Practice (“CUSPAP”) as amended from time to time by the Appraisal Institute of Canada.

4. When preparing Program appraisals for acquisition of a property interest less than a complete buyout of the fee simple interest in the property, the “Before and After” method of valuation shall be used to estimate the reduction in market value of the owner’s property as a result of the property interest acquired (the “securement”). The Before and After method shall deduct the market value of the owner’s

remaining property after the securement from the market value of the owner's entire property before the securement to determine the market value of the securement. In the event the securement results in the owner's property after the securement being comprised of more than one parcel of land, the market value of the owner's remaining property after the securement shall include any increase in value to the owner resulting from the creation of the additional parcel(s).

5. Prior to submitting a final appraisal, the appraiser shall provide the Conservation Partner and Regional staff with a digital copy of the appraisal for review, using the Portable Document Format (.pdf extension).
6. The Conservation Partner and Regional staff shall each review the appraisal, and may discuss it with each other and/or the appraiser as required. The parties shall attempt to resolve any dispute arising out of or relating to the outcome of an appraisal through negotiations between the senior Regional staff and senior Conservation Partner staff who have authority to bind the parties and settle the same. If the parties cannot reach a resolution within thirty (30) days of the dispute being made known to the other party then the parties acknowledge and agree that the Region shall in good faith make an arbitrary decision in its sole discretion, acting reasonably. Regional staff will provide written comments to the Conservation Partner who shall forward those comments along with the Conservation Partner's comments to the appraiser for finalization of the appraisal.
7. Upon completion of the final appraisal report, the appraiser shall provide Regional staff and the Conservation Partner each with one signed original hardcopy appraisal report, and one digital copy of the report using the Portable Document Format (.pdf extension).
8. Regional staff shall review the final appraisal report and, if satisfactory, shall provide the Conservation Partner with a written approval confirming that the appraisal is satisfactory for use in a Greenlands Securement funding request.
9. A Phase 1 Environmental Site Assessment (ESA) report shall be required as a condition of funding approval. The requirement for additional site investigation through a Phase II or III ESA, actual remediation and submission of a Record of Site Condition will be determined upon review of the Phase I ESA report in consultation with Regional staff and/or Council in accordance with the Implementation Guidelines for supporting documents. Any Phase I ESA which concludes that additional investigation is recommended will be reviewed by Regional staff in consultation with the Conservation Partner to determine if costs for further environmental investigations will be eligible and/or recommended for reimbursement under the Program, and/or if the potential risk warrants that the securement should be abandoned. The Program requirement for submission of a Phase I ESA will assist in determining if the appraised market value is affected by environmental site conditions. In cases where the Conservation Partner has undertaken a site investigation and has submitted documentation satisfactory to the Region that the property is unlikely to have hazardous site conditions, the requirement for a Phase 1 ESA may be waived upon recommendation of the Manager of Real Estate or designate at the discretion of the Manager Integrated Planning.

10. To avoid unnecessary Program costs, Peel staff and the Conservation Partner may agree to waive the requirement for an external appraisal in cases where:
 - a) the total cost of the securement is nominal or is low enough in the opinion of the Region of Peel - Manager of Real Estate that it does not warrant the expense of an external appraisal, or
 - b) another appraisal completed for the Program is sufficiently comparable to the proposed securement in terms of time, location and other characteristics that it may be reasonably relied upon for valuation, or
 - c) another appraisal completed for a similar or related program such as the Federal Ecological Gifts program is, upon review by Peel staff and the Conservation Partner, agreed to provide sufficient evidence of value for the proposed securement.

11. Where an appraisal and/or a Phase I or Phase II Environmental Site Assessment (ESA) report has been procured by a Conservation Partner in compliance with the Implementation Guidelines, and negotiations with a prospective landowner participant have not resulted in a securement being completed, the Region of Peel, Manager Integrated Planning may approve 100 percent reimbursement of the appraisal and/or Phase I or Phase II ESA costs upon consultation with the Manager of Real Estate or designate. If so approved, no approval shall be required from Regional Council. A local municipality shall not be eligible for reimbursement of their appraisal and/or Phase I or Phase II ESA costs.

12. Where a transaction will result from a 100 percent donation of land or a conservation easement, the appraisal will be shared with the Region of Peel for information purposes only.

Appendix X Delegated Authority Approval Form
GREENLANDS SECUREMENT PROGRAM
DELEGATED AUTHORITY APPROVAL FORM

To (CAO or designate) DATE
 Regional CAO

FROM (Commissioner or designate) RE: **Reference staff report title**
 Commissioner of Corporate
 Services

RECOMMENDATION

That the Regional CAO approve the Greenlands Securement Program funding request application for (property legal description location) and grant funding to the (organization to receive funding) for the amount of \$(enter amount) as per the Greenlands Securement Guidelines;

And further, that (enter any condition clauses)

And further, that the funds for the securement in the amount of \$(enter amount) be provided from the Greenlands Securement Capital Project xx-3310;

And further, that the (organization to receive funding) provide final invoices to support the work undertaken, with the Region of Peel contribution adjusted to reflect (enter amount agreed upon) per cent of the final invoices.

(enter name of Commissioner or designate)
 Commissioner of Corporate Services

<input type="checkbox"/> Approved	<input type="checkbox"/> Approved with Conditions	<input type="checkbox"/> Denied
<p>_____</p> <p>(enter name of Regional CAO or designate) Regional CAO</p>		<p>_____</p> <p>Date</p>

Signing of this form confirms that all policies and procedures of the Greenlands Securement Program Implementation Guidelines have been met.