

# Halton Region Greenlands Securement Strategy

Implementation Guidelines

July 2009



## Table of Contents

Section 1: Background.....	2
Section 2: Targeting Priority Areas and Properties.....	2
Section 3: Landowner Contact and Education Program.....	4
Section 4: Greenlands Securement Program Application Process.....	5
4.1 Halton Partner Responsibilities .....	7
4.2 Region Responsibilities .....	8
Section 5: Completing a Greenlands Securement Program Application .....	8
5.1 Eligibility .....	8
5.2 Eligible Project Costs .....	9
5.3 Supporting Documents, Legal Documents and Professional Services .....	10
5.4 Consultation with Regional and Local Municipal Staff.....	10
Section 6: Evaluating a Greenlands Securement Program Application.....	12
Section 7: Recommendations of the Planning and Public Works (PPW) Committee .....	12
7.1 Determining the Appropriate Approval Authority.....	12
7.2 Procedure for Obtaining Written Approval of Applications .....	12
Section 8: Reporting .....	13
8.1 Annual Reporting.....	13
8.2 Annual Business Plans and Cases .....	13
Definitions .....	14
Glossary.....	16

## Appendices

- Appendix 1: Landowner Contact Letter
- Appendix 2: Landowner Handout
- Appendix 3: Donation and Purchase Process
- Appendix 4: Application Process
- Appendix 5: Application Form
- Appendix 6: Application Evaluation Form
- Appendix 7: Sample Land Acquisition Agreement
- Appendix 8: Environmental Inspection Form
- Appendix 9: Commissioner Approval Form

## Section 1: Background

The Regional Municipality of Halton (“*Region*”) covers over 93,887 hectares (232,000 acres) of land (967 square kilometres) and is home to 439,256 residents (2006 Census). In addition to the prominent Niagara Escarpment and Lake Ontario shoreline, the Region is characterized by 18,500 hectares (45,695 acres) of forests, wetlands, river and stream corridors and other natural features designated as the Regional Greenlands System (“*Greenlands System*”) within its Official Plan. There are currently 5,494 hectares (13,577 acres) or approximately 30% of the Greenlands System secured in public ownership by partners. However, on a total land mass basis only 6.3% of the Region has achieved environmental long term protection. The Greenlands Securement Strategy (“*Strategy*”) and Implementation Guidelines (“*Guidelines*”) are intended to bring to the table land securement partners (“*Halton Partners*”), funding partners and other available resources within the Region to work cooperatively towards complimentary goals of securing additional greenlands.

The concept of a Strategy for the Region was introduced in the 2002 Official Plan Review Directions Report – *The Greening of Halton – Smart Growth, Smart Choices* which was a background report to Official Plan Amendment #25 (ROPA 25), a comprehensive plan review. The Strategy is intended to complement existing programs by conservation authorities and other agencies involved in land securement for permanent natural heritage protection in support of the policies of the Greenlands System. To support the Strategy, Regional Council authorized the establishment of a Halton Green Fund to be used, in part, to fund land securement. The Strategy is intended to assist Halton Partners with securement projects while keeping costs at a minimum. In order to stretch limited available funds, the Greenlands Securement Program (“*Program*”) proposed in the Strategy will be focused on donations of land or purchases of land through leveraged partnership funds or split-receipt options.

Regional Council advocates the principle of ‘land stewardship’ that all landowners are entitled to reasonable use and enjoyment of their land but are also stewards of the land and should give proper regard to the long term environmental interests in proposing any land use change to their property. With this in mind, a primary goal of the Program is to educate landowners with significant landholdings within the Region about various long-term conservation options that are available. This will be achieved through a strategic landowner education and awareness program which includes proactive landowner contact as well as organized landowner workshops.

The Guidelines is intended to guide partners in the implementation of the Strategy in the Region. The Program is intended to assist partners with maximizing their time, effort and resources in securing more ecologically significant greenlands by providing leveraged funding opportunities for land securement projects and ensuring adequate resources are in place to represent the broad and combined conservation interests of all applicable partners.

## Section 2: Targeting Priority Areas and Properties

From the general focus area of the Greenlands System, a list of Priority Areas and priority properties needs to be developed. The adage of ‘bigger is better’ is a paramount factor in land securement success. The costs associated with securing a small property versus a large

property are relatively the same. Therefore, focusing resources on the acquisition of larger parcels is generally the most cost effective method.

In addition to the size of the parcel, there are other important factors to consider when identifying priority properties for securement. Some of these may include:

- 1) Degree of ecological significance (e.g. some properties may have 75% wetland coverage where others are only 10% wetland coverage);
- 2) Strategic importance (e.g. when linking a wildlife or trail corridor, or expanding an existing holding. Sometimes it is appropriate to acquire an important property because of the predicted future acquisitions of other adjacent parcels);
- 3) Existing uses of the land (e.g. some properties may be mostly used for residential purposes or a horse farm); and
- 4) Likelihood of securing other leveraged funds (e.g. there are funding organizations that may contribute 50% of project costs to properties that complement their specific program).

## **Developing a List of Priority Areas and Priority Properties**

### **Step #1**

Generate maps using the Region's GIS resources to identify the following:

1. All existing secured land in the Region;
2. Priority Areas for securement established by the Region and its partners.

Parcel fabric data (i.e. ESRI shapefiles) for existing secured lands will be obtained from partners and mapped by the Region. Maps will be revised throughout the implementation process as data is provided.

### **Step #2**

Identify priority properties. The following selection parameter is an example of what could be applied to identify and rank priority properties for securement:

Priority A = properties greater than 50 acres

Priority B = properties ranging from 25 – 49 acres

Priority C = properties ranging from 10 – 24 acres

Despite having a smaller size, some properties may rank higher when other attributes are considered such as vacancy of the land, amount of wetland or forest cover or whether the property is adjacent to an existing protected area or Regional Forest Tract.

### **Step #3**

Retrieve a list of landowner names and mailing addresses from the Region's GIS database based on properties identified in the Priority Areas. Properties held by corporations can be identified and reduced in priority unless deemed critical. Partners are also to provide lists of key landowners with insightful notes.

#### **Step #4**

Interpret air photos and ortho imagery to help assess current and historical land use and potentially assist with the identification of landowners more likely to be conservation minded; and thus, more receptive to donation options.

#### **Step #5**

Finalize the list of priority properties organized into a table that can be updated easily. The list developed from the above steps will give direction for landowner contact and outreach.

#### **Step #6**

Get PPW Committee endorsement and Regional Council approval of the Priority Areas as they are developed or revised.

### **Section 3: Landowner Contact and Education Program**

The landowner outreach and education program will include:

- a. **Developing a Landowner Contact List:** Using the list of priority properties identified by the Region and its Halton Partners (as described in Section 2); a landowner contact list is developed for each Priority Area. Landowner contact information will be collected (e.g. mailing address, phone number) so that packages can be distributed and followed-up on. For areas where Halton Partners are directly involved in landowner contact (e.g. Niagara Escarpment – Bruce Trail Conservancy or Conservation Halton’s stewardship program), these landowners can be included in the list, but the direct contact can be left to the Halton Partner organization. All landowner contact will be done in coordination with the Halton Partner.
- b. **Mailing:** This will involve sending out an introductory Landowner Contact Letter (Appendix 1), and a Landowner Handout (Appendix 2) which outlines the various long-term securement options available to landowners as well as an Ecological Gifts Program brochure. The goal is to introduce the landowner to the material and ‘break the ice’ so that a telephone call can be made several weeks later to follow up on the material provided.
- c. **Telephone:** This step involves calling priority landowners to introduce them to the Program, identify and discuss other Program information they may be interested in and attempt to arrange a meeting with the appointed person to discuss landowner options. This would only occur following the direct mail out of a package so that the telephone call is not a ‘cold call’. The primary purpose of the phone call is to educate the landowner on long-term securement methods, various stewardship programs and monetary donation options that may be of interest. An advantage of landowner contact for landowners uninterested in permanent protection is the education they’ll receive on stewardship options that can provide funding to enhance their property through tree-planting, wetland improvement etc.
- d. **Drop-Ins:** On occasion, there may be visits to landowners in Priority Areas. It is especially important to drop in on properties for sale or properties that are ecologically significant to introduce the landowner to the Program.

- e. **Scheduled Site Visits:** Once a landowner is contacted and has expressed some interest in the Program, a site visit or landowner visit will be scheduled. At this time, more land securement information can be provided to the landowner. It is always recommended to the landowner that they need to seek individual legal, tax and financial advice as well as talk to their family prior to making any decisions about their land.
- f. **Landowner Leads:** This involves utilizing previously established landowner contacts made by various individuals in the community, organizations and municipalities. These will be followed up after discussion with the hand-off agency on the appropriate next steps. This approach is one of the most effective for entering into meaningful discussions. Municipal councillors, conservation authority stewardship staff and NGO volunteers often get to know landowners in a positive way making a hand-off a friendly transition.
- g. **Landowner Workshops:** The Region will organize and sponsor a minimum of one landowner workshop per year for residents of the Region who own ecologically significant land and farmland. Typically, these information forums will be two hours in length and held at convenient times for landowners (evenings or weekends). These workshops can be provided free to landowners with the goal of educating them about long-term securement and stewardship methods. A workshop or public information session could be held before the Program is initiated in order to introduce the Program to the landowners in the Priority Areas.

Once initial contact has been made, the Halton Partner to take title to the donation or easement will be contacted and brought into the securement process.

In addition to mailing information packages, another way of communicating information to landowners about land conservation is to add Program information to Halton Partner websites. This will allow landowners to review information via the internet and contact the Halton Partners proactively, if they are interested. Also, the Halton Partners are encouraged to give presentations to the various groups and service clubs in their jurisdiction as another means of educating the public and landowners about land conservation and tax benefits.

Landowners who are considering long-term protection of their property may be sceptical of whether they have a guarantee that the land they donate will never be sold or used for development in the future. The Halton Partners will need to consider how to communicate key messaging and policies relating to long-term protection and securement in order to alleviate any concerns landowners may have.

## **Section 4: Greenlands Securement Program Application Process**

Potential securement projects will be brought forth to the Region by the Halton Partner. Halton Partners are to complete and submit an Application Form (Appendix 5) on their own behalf. For properties that come forward as a result of the Landowner Contact and Education Program, the applicable conservation authority will be given first-refusal. If the conservation authority decides not to pursue the securement project, then the appropriate land trust(s) will be contacted. If the parcel of land in question is on the Bruce Trail Conservancy's optimum route, BTC will be concurrently informed.

The roles and responsibilities of the Region and Halton Partners with respect to acquiring greenlands and areas under the Program are outlined in the Sample Land Acquisition Agreement (Appendix 7), as amended from time to time. The process of identifying properties, contacting landowners and closing is outlined in the Donation and Purchase Process (Appendix 3). In addition, the Region and Halton Partners are responsible for carrying out specific tasks throughout the process. The Application Process (Appendix 4) outlines the process for submitting and reviewing an Application for securement funding made by the Halton Partners. The process identifies staff responsibilities, major tasks and communication flow.

To coordinate efforts and avoid duplication, the Stakeholder Working Group (“SWG”), comprising staff from the Region and Halton Partners involved in land securement, will meet at least twice a year to identify and recommend to the Region Priority Areas for securement. The SWG may include staff or members from the following groups:

Bruce Trail Conservancy  
City of Burlington  
Conservation Halton  
Cootes to Escarpment Conservation and Land Management Strategy  
Credit Valley Conservation  
Escarpment Biosphere Conservancy  
Grand River Conservation Authority  
Hamilton Remedial Action Plan  
Head of the Lake Land Trust  
Ministry of Natural Resources  
Niagara Escarpment Commission  
Ontario Farmland Trust  
Ontario Nature  
Town of Halton Hills  
Town of Milton  
Town of Oakville

#### Funding Groups

Ducks Unlimited Canada  
Greenbelt Foundation  
Nature Conservancy of Canada  
Ontario Heritage Trust  
Ontario Land Trust Alliance  
Trillium Foundation  
Wetland Habitat Canada

The composition of the SWG is subject to change as needed and when appropriate to address specific securement projects and/or initiatives. Regional Planning Department staff will provide administrative support for the SWG by organizing and facilitating meetings, circulating agendas and meeting minutes, and distributing relevant information to the group members.

The Region will coordinate the Program. When reviewing Applications, staff from departments such as Finance, Housing and Property, Public Works and Legislative Services will provide technical support and recommendations.

The Regional Planning Department will provide administrative support to other involved Regional staff by organizing and facilitating meetings, circulating agendas and meeting minutes and distributing relevant information.

Article 4.1 describes the roles and responsibilities of Halton Partners throughout the Application Process.

#### **4.1 Halton Partner Responsibilities**

- a) Halton Partners interested in participating in the Program are responsible for attending at least one SWG meeting to identify Priority Areas for land securement in the Region. The identification of Priority Areas will be done annually.
- b) Halton Partners are responsible for reporting to their respective Board of Directors and Councils regarding their involvement with the Program.
- c) Halton Partners are encouraged to continue to work with landowners who they have an existing relationship with as to their interest in additional land securement options.
- d) Halton Partners are also encouraged to contact those landowners that fall within the identified Priority Areas for land securement.
- e) If a landowner is interested in discussing land conservation, Halton Partners are responsible for arranging meetings with these landowners and providing relevant and appropriate information related to their land securement programs and the Program. Halton Staff will be consulted during this process as well.
- f) After the Halton Partner meets with a willing landowner, the Halton Partner will work with Regional staff to arrange a meeting with the appropriate local municipal staff if necessary. This meeting will allow local municipality and Regional staff to identify and clarify potential land use issues that may affect the securement project and/or funding opportunities.
- g) Once the Halton Partner has received Board or Regional Council approval they can approach the Region for funding for the securement project.
- h) The next step will be for the Halton Partner to complete an Application Form. If the Application is approved by the Region, the Halton Partner may begin gathering background information and supporting studies (appraisal, survey, agreement of purchase and sale or donation agreement).
- i) Once all studies are completed, Regional staff will seek approval to release the monies through a formal report and resolution from the PPW Committee and Regional Council which will be distributed to the Halton Partner.
- j) If the Application is denied the Halton Partner is responsible for soft costs incurred for the project.

Note: Within the Sample Land Acquisition Agreement, the Halton Partner is required to obtain the written approval of Applications from the Region prior to commencing any sale transactions. However, the Halton Partner can always take a risk by paying for an appraisal, purchasing a property, and then requesting funds retroactively. There may be circumstances where properties are listed for sale and an offer needs to be made more quickly than the Application process will allow. In this case, it is recommended that the Halton Partner submit the Application to the Region and discuss the project as early on in the negotiation process as possible so the Region and the Halton Partner will have a better understanding of the risks involved before any formal decisions are made.



## **4.2 Region Responsibilities**

- a) Regional staff are responsible for organizing at least one SWG meeting to identify Priority Areas for land securement in the Region. The identification of Priority Areas will be done annually.
- b) After the Halton Partner meets with a willing landowner, Regional Staff will work with Halton Partner staff to arrange one or more meetings with appropriate local municipal staff. These meetings will allow for 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 determine the project's eligibility for funding.
- c) Planning staff may request additional information from Halton Partners if needed. Regional staff can arrange meetings with Halton Partners to clarify any questions or concerns.
- d) Upon review of the Application Evaluation Form (Appendix 6), Regional staff may identify the need for additional supporting studies. If this is the case, Regional staff will notify the Halton Partners and work with them to prepare and present a status report to Regional staff for consideration.
- e) Once an Application is received from the Halton Partners, Regional Planning staff will review the Application for its completion and circulate it with supporting documents to relevant Regional staff for comments if required. After comments are received from the relevant departments, Planning Staff will complete an Application Evaluation Form.
- f) Once an Application has been accepted by Regional staff they will make a recommendation to the PPW Committee which then makes a recommendation to Regional Council to release monies.

## **Section 5: Completing a Greenlands Securement Program Application**

Halton Partners are required to complete an Application Form and submit it to the Region.

### **5.1 Eligibility**

To be eligible for funding the subject property must contain at least one of the following land designations/attributes referred to as Primary Criteria:

#### **Primary Criteria**

- Lands within the Greenlands System, which may be termed the Natural Heritage System (NHS), including lands which are identified as follows:
  - Regulatory Floodplains (and associated valley and stream corridors as determined by the conservation authorities);
  - Lake Ontario and Burlington Bay shoreline outside Regional Waterfront Parks;
  - Provincially Significant Wetlands;
  - Significant Portions of the habitat of endangered and threatened species;
  - Environmentally Sensitive Areas;
  - Public Open Space as identified in The Parkway Belt West Plan;
  - Regionally Significant Wetlands;
  - Provincially and Regionally Significant Areas of Natural and Scientific Interest;

- Significant Woodlands;
- Carolinian Canada Sites;
- Halton Regional Forests;
- Environmental Protection Areas identified in the North Aldershot Inter-Agency Review Final Report (May 1994);
- Lands designated as Niagara Escarpment Plan “Escarpment Natural Area”;
- Lands designated as Greenbelt Plan “Natural Heritage System”; and
- Lands identified as a priority within a strategy by a conservation authority or other partner agency.

## **Secondary Criteria**

Additional preference for funding eligibility is also given to properties that meet Secondary Criteria. These include:

- Lands contiguous to the Halton Regional Forest, Conservation Areas or other public and/or protected lands;
- Lands identified as Niagara Escarpment Plan “Escarpment Protection Area”;
- Lands identified as Greenbelt Plan “Protected Countryside”;
- Priority Areas for protection and/or restoration (e.g. as identified within a Watershed, Subwatershed or ESA Study and agricultural lands);
- Significant cultural/historical resource (e.g. archaeological site);
- Significant water resources (e.g. floodplain, streams, headwater area, source water area, non-evaluated wetland, estuaries);
- Trail corridor/linkage (e.g. Bruce Trail Optimum Route);
- Significant wildlife habitat;
- Regionally rare communities;
- Agricultural lands offered for:
  - donation
  - significantly leveraged by funding partners
  - or agricultural easements;
- Lands which provide opportunity/potential for enhanced connectivity between any of the above features;
- Unopened road allowances (e.g. for conservation, trail purposes);
- Rehabilitated aggregate pits and quarries offered for donation; and
- Designated Wellhead Protection Area.

The Secondary Criteria were developed to complement the prioritization of eligible lands. These include lands which have the opportunity to contribute to the goals and objectives of other Regional programs, such as those within a municipal wellhead protection area.

## **5.2 Eligible Project Costs**

Project costs are defined within Article 2 of the Sample Land Acquisition Agreement. Securement funding can be applied up to 50% for purchases and 100% for donation. For a split-receipt, up to 50% of cash portion will be considered by the Region.

Examples of eligible costs may include:

- Title searches
- Market value appraisals
- Survey costs
- The cost of conducting environmental inspections or assessments
- Legal and real estate costs
- Purchase price
- Applicable taxes
- Baseline Documentation Reports
- Initial signage and fencing
- Consultant assistance (e.g. negotiation, project management)

### **5.3 Supporting Documents, Legal Documents and Professional Services**

It is anticipated that Regional staff will require supporting documents as part of any Application to the Region made under the Program. These supporting documents may include:

- Current Market Appraisal
  - Full narrative appraisal by an Accredited Appraiser of the Canadian Institute (AACI) to *Canadian Unified Standards of Professional Appraisal Practice*;
  - For donations through the Ecological Gifts Program, all appraisals must meet *Ecogift Guidelines for Appraisals*; and
  - Opinion of value by an AACI, CRA or realtor if the subject property is believed to be less than \$25,000.
- Environmental Inspection Form (Appendix 8).
- Phase 1 Environmental Site Assessment (as required)
- Title Search
- Survey
- Agreement of Purchase and Sale or Letter of Intent
- Contract for Legal Services
- Contract for Real Estate Services
- Standards for Negotiations to Purchase a Property

During the Application review meeting, the scope of work and range of supporting documents and professional services will be determined by planning staff. The scope of work for each document or service will depend on the property and circumstances at the time of the proposed project.

### **5.4 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 through the Sample Land Acquisition Agreement that the Halton 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 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 Halton Partners must also provide a summary of comments received from the local municipalities as part of their Application submission.

The Halton Partners are also required to consult with the local municipalities, through the SWG meetings when identifying Priority Areas for land securement.

Throughout the Application process, the Halton Partners may meet with 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 standards for background studies. Regional Planning staff will work with local municipal staff to coordinate such meetings.

## **Section 6: Evaluating a Greenlands Securement Program Application**

Regional Planning staff will complete an Application Evaluation Form (Appendix 6), which will be circulated with the Application to the PPW Committee for recommendation to Regional Council. Hard copies of all supporting documents and supplementary information will be made available for review through the Planning Department.

The Application Evaluation Form provides guidance to members of the PPW Committee when developing recommendations on securement projects. Using the Application Evaluation Form, properties are evaluated based on a property's contribution to the requirements of the Program, eligibility requirements, land use factors as well as the value of securing the property to the Region.

## **Section 7: Recommendations of the Planning and Public Works (PPW) Committee**

### **7.1 Determining the Appropriate Approval Authority**

As stated in the Guidelines and Sample Land Acquisition Agreement, the Region will generally fund up to 50% of the required funding, where appropriate, to the Halton Partner from the Halton Green Fund to be used to leverage funding from other funding partners in order to offset costs necessitated by land securement transactions.

Regional Council has given authority to the Regional Commissioner of Legislative and Planning Services and Corporate Counsel to approve Applications up to \$100,000, which is consistent with Regional purchasing policies.

### **7.2 Procedure for Obtaining Written Approval of Applications**

Within the Sample Land Acquisition Agreement, the Halton Partner is required to obtain written approval of Applications from the Region prior to commencing any sale transactions.

In cases where Regional Council approval is required for Applications, written approval will be provided through Council Resolution annually or on an Application by Application basis. Regional staff will provide the Halton Partner with either a digital or hardcopy of the Council Resolution.

In cases where approval from the Regional Commissioner of Legislative and Planning Services and Corporate Counsel is required for Applications, written approval will be obtained using the Commissioner Approval Form (Appendix 9). Regional staff will provide the Halton Partner with either a digital or hardcopy of the Regional Commissioner's approval.

## **Section 8: Reporting**

### **8.1 Annual Reporting**

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

- a) Summary of Applications received;
- b) Recommendations made to the Commissioner and Regional Council on Applications;
- c) Summary of expenditures; and
- d) Appropriate levels of funding for the Halton Green Fund.

Planning staff will report the above information to Regional Council through a report from the Commissioner of Legislative and Planning Services and Corporate Counsel.

Regional staff will send the Halton Partner and appropriate local municipalities copies of the PPW Committee meeting minutes and Council Resolutions that relate to the Application. The Halton Partners will be responsible for reporting to their Board of Directors. The local municipalities will also be responsible for reporting to their respective Councils.

### **8.2 Annual Business Plans and Cases**

The obligation of the Halton Partners to prepare annual business plans and cases, complete with performance measures as outlined in Article 4.1 (n) of the Sample Land Acquisition Agreement, as amended from time to time. These business plans and cases are to be developed in consultation with appropriate Regional and local municipal staff and will be used by Regional staff, the PPW Committee and Regional Council to determine the funding needs for the Program.

In addition, local 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, the PPW Committee and Regional Council to monitor the effectiveness of the Program. The performance measures should at a minimum report on the following trends:

- Percentage of lands secured (grouped by the securement tool, including lands dedicated through the development/planning process) by the securement strategies of the Halton Partners;
- Number and total area of priority properties secured;
- 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.)

## Definitions

**“Application”** is an application under the Program.

**“Greenlands System”** is the Regional Greenlands System of the Official Plan, which may be termed the Natural Heritage System (NHS).

**“Guidelines”** is the Strategy Implementation Guidelines which are protocols and standards intended to guide the PPW Committee and Halton Partners in preparing, receiving, reviewing and making recommendations regarding property identification and Applications submitted to the Region. The PPW Committee will review the Guidelines annually and may amend them as necessary, subject to approval by Regional Council.

**“Halton Green Fund”** is the capital account for the Program; withdrawals from the Halton Green Fund are subject to the recommendation of Regional Staff, the PPW Committee and approval of either the Regional Commissioner of Legislative and Planning Services and Corporate Counsel or Regional Council.

**“Halton Partner”** is an official land securement partner participating in the Program. These partners include conservation authorities, local municipalities, land trusts and NGO’s whose mandate is to protect ecologically significant and/or agricultural lands for conservation purposes. Halton Partners have specific roles and responsibilities as outlined in the Guidelines. The word “partner” is used to refer to the generic meaning of partner or to refer to other partners involved in the program such as funding partners.

**“land acquisition”** means the attainment of interest in land title for conservation purposes. It encompasses, without limitation, the tools of donation, conservation agreements, and fee-simple purchase.

**“land securement”** means 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 land acquisition.

**“local municipality”** means a lower-tier municipality within the Region, consisting of the City of Burlington, Town of Halton Hills, Town of Milton and Town of Oakville.

**“PPW Committee”** is the Planning and Public Works Committee of Regional Council established to review, analyze and provide recommendations to Council on property identification and Applications.

**“Primary Criteria”** is a set of land designations/attributes used to determine if a property is eligible for funding under the Program. A property must meet at least one of the designated criteria to be eligible for funding.

**“Priority Area”** means an area of land targeted for securement by the Region and its partners.

**“Program”** is the Greenlands Securement Program to protect valuable greenlands in the Region proposed for implementation and adoption in the Strategy.

**“Region”** means the geographic area within the jurisdiction of the Regional Municipality of Halton.

**“Regional Council”** is the governing body over the Regional Municipality of Halton.

**“Secondary Criteria”** is the second tier of requirements under the Program following Primary Criteria. Additional preference for funding eligibility is considered when properties meet any of the identified Secondary Criteria designations and attributes.

**“Strategy”** is the Greenlands Securement Strategy which sets out the intention to establish the Program and bring together land securement partners, funding partners and other available resources within the Region to work cooperatively towards complimentary goals of securing additional greenlands.

**“SWG”** is the Stakeholder Working Group comprising staff from the Region and the Halton Partners involved in land securement, funding, stewardship etc. The SWG discusses and establishes Priority Areas and priority properties for securement in the Region and makes recommendations to the PPW Committee.



## Glossary

### **Areas of Natural and Scientific Interest (ANSI)**

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

- **Life Science** Areas of Natural and Scientific Interest are those areas identified by the Ministry of Natural Resources for their high quality representation of important provincial biotic attributes.
- **Earth Science** Areas of Natural and Scientific Interest are those areas identified by the Ministry of Natural Resources for their high quality representation of important provincial geological attributes.

### **Conservation Agreement**

Also called conservation easements. A landowner retains ownership of a property but allows restrictions to be placed on the deed to the property, thereby, establishing long-term protection for the ecological functions of the property. Conservation agreements can be purchased or donated and can result in tax credits to the property owner through the federal Ecogifts Program.

### **Greenlands System**

Lands within the Regional Greenlands System, which may be termed the Natural Heritage System (NHS), including lands which are identified as one or more of the following Official Plan designations:

- Provincially and Regionally Significant Wetlands;
- Regulatory Floodplains (and associated valley and stream corridors);
- Significant Portions of the habitat of endangered and threatened species;
- Environmentally Sensitive Areas;
- Provincially and Regionally Significant Areas of Natural and Scientific Interest;
- Significant Woodlands; and
- Carolinian Canada Sites.

### **Environmentally Sensitive or Significant Areas (ESAs)**

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. These are areas designated by various conservation authorities, or sensitive areas identified by the Ontario Ministry of Natural Resources in series such as their Sensitive Area Reports (SAR).

### **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; valley lands; woodlands; habitats of vulnerable, threatened and endangered species; and Areas of Natural and Scientific Interest.

### **Priority Area Identified by a Watershed or Subwatershed Study**

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

### **Regionally 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 regional or provincial range by changes in land use or increases in certain types of human activity.

### **Sustainable Halton**

Sustainable Halton refers to the Region's growth management initiative for building sustainable and healthy communities for generations to come. The Sustainable Halton plan will help the Region meet the provincial requirements of the Greenbelt Plan and the Places to Grow Plan, and will help develop the Region's next Official Plan.

### **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. The limit of valley and stream corridors shall be determined, jointly with the local municipalities, on a site specific basis by the conservation authorities.

### **Vulnerable, Threatened and Endangered Species**

Those species which have been listed by the Ministry of Natural Resources as occurring in sufficiently low population numbers, restricted geographic areas, or are sufficiently threatened by human activities, that their continued occurrence in Ontario is a matter of general conservation concern. The actual species falling into this category of conservation concern vary from region to region in the province, as well as over time depending on ongoing research, recovery or mitigation efforts. Endangered species are listed in the Regulations under the provincial *Endangered Species Act*. Current lists of threatened species and species of conservation concern are maintained by the Ministry of Natural Resources.

### **Water Resources**

Water resources in the Region 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**

Means 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.

- **Provincially Significant Wetland:** a wetland identified as provincially significant by the Ministry of Natural Resources using evaluation procedures established by the province, as amended time to time.
- **Locally Significant Wetland:** a wetland identified as locally significant by the local municipalities within the Region.

For more information contact:



905-825-6000  
Toll Free 1-866-4HALTON (1-866-442-5866)  
TTY 905-827-9833  
[www.halton.ca](http://www.halton.ca)

## Appendix 1: Landowner Contact Letter

---



Date

Landowner Name  
Address  
City/Town  
Ontario Postal Code

Dear Landowner:

Have you ever thought that your actions could significantly add to the environment and the community around you?

Halton Region is working with local conservation authorities to provide landowners, like yourself, additional opportunities with regard to protecting the natural features on your land while also contributing to the natural environment around you. Many of these options offer significant tax advantages. Some options can also help you eliminate the liability associated with owning hazard lands or floodplain. All of these options result in you helping the natural environment and the community by enhancing the existing greenspace (i.e. valley land, forests and wetlands) around your property.

After you have reviewed the information accompanied with this letter, I would be pleased to discuss any questions you may have at your earliest convenience. I would also like to invite an opportunity to arrange a meeting with you to review the program in greater detail and discuss what conservation options will best serve you.

Yours in conservation,

Name  
Halton Region

*\*Letters are subject to Regional approval prior to distribution.*



## Leaving a Conservation Legacy

As a landowner you may decide to protect the natural and/or cultural features of your land for a variety of reasons. Some landowners want to protect the heritage values of their land for future generations. Some may see conservation as a way to resolve property or potential income tax challenges, while others may view it as a way of sorting out future uses of a property now shared by members of an expanding family or community group.

## Options for Landowners

The following are general examples of ways to conserve your land in perpetuity:

**Land Donation**  
The simplest option is to donate your land to your favourite conservation organization. Gifts of land can remain in charitable or public hands and be protected forever. Conservation organizations are pleased to provide appropriate recognition of your gift through naming, signage or by other means according to your wishes. A tax receipt is issued for the land's value.

**Life Interest**  
Another option is to donate your property and still continue living on it or utilizing it in some other way through the use of a "life interest" agreement. This agreement is for your lifetime or a specified term. The conservation organization serves as the land steward.

**Split-Receipt**  
In some cases you can donate part of the value of your land and receive cash for the remainder. This is called a split-receipt and a tax receipt is issued for the donated portion. This option could be available if the conservation organization has money to put towards a partial purchase.

**Conservation Severance**  
Part of your property could be severed and donated for conservation purposes. This option can be attractive if you want to establish a nature preserve around your home that will be professionally stewarded and protected in perpetuity. Donating part of your land to a conservation organization will also help relieve the burden of liability associated with owning land.

**Bequest**  
A powerful conservation option is a bequest of land. You can name a conservation organization as a primary or secondary beneficiary in your Will. Conservation organizations will be happy to work with you and your lawyer on drafting the terminology suitable to meet the needs of everyone involved.

**Conservation Agreement**  
Also called a conservation easement, this agreement provides you with the flexibility of retaining ownership and use of your land while protecting significant features. Conservation agreements are legal documents by which you voluntarily place restrictions on specific activities on your property or over a designated area. The agreement runs on title and is tailored to fit your particular interests and the features to be protected, so that all future owners are bound by your conditions.



## Linking Conservation with Financial Benefits

Land donations, partial land donations or donations of an interest in land through a conservation agreement can provide significant tax advantages. A third party, unbiased appraiser determines the value of the donation and a charitable receipt is issued for this value. The appraisal amount for a conservation agreement varies depending on factors such as development potential of the property and the nature of the conditions included in the agreement. Donating land or a conservation agreement through Environment Canada's Ecological Gifts Program provides enhanced income tax savings that can be used against 100% of your total annual income over five years plus the year of donation. In addition, Ecogifts are subject to zero capital gains tax (versus 50 percent on non-Ecogift donations). Environment Canada's Ecogifts program certifies specific organizations to act as recipients of ecological gifts. They include all levels of government as well as qualified charitable conservation organizations such as land trusts and conservation authorities. For more information contact the Ecological Gifts Program.

Visit [www.on.ec.gc.ca/ecogifts](http://www.on.ec.gc.ca/ecogifts) Email [ecogifts.ontario@ec.gc.ca](mailto:ecogifts.ontario@ec.gc.ca) Telephone 416.739.4286

## Conservation Partners

Long-term conservation options require you to seek a conservation partner, or a recipient organization for your donation, to help you protect your land and carry out your wishes beyond your lifetime. The first step is to discuss your vision with one or more conservation partners of your choice. The two main types of conservation partners are conservation authorities and land trusts. As a landowner, you are aware that the cost and responsibility of managing land should not be taken lightly. The organization you choose should have the capacity to deal with long-term issues such as stewarding the land according to your wishes. Many properties have good conservation values; however, each organization has its own set of criteria, programs and resources that will dictate their interest in any specific property. Visit the following links for more information on conservation authorities and land trusts:

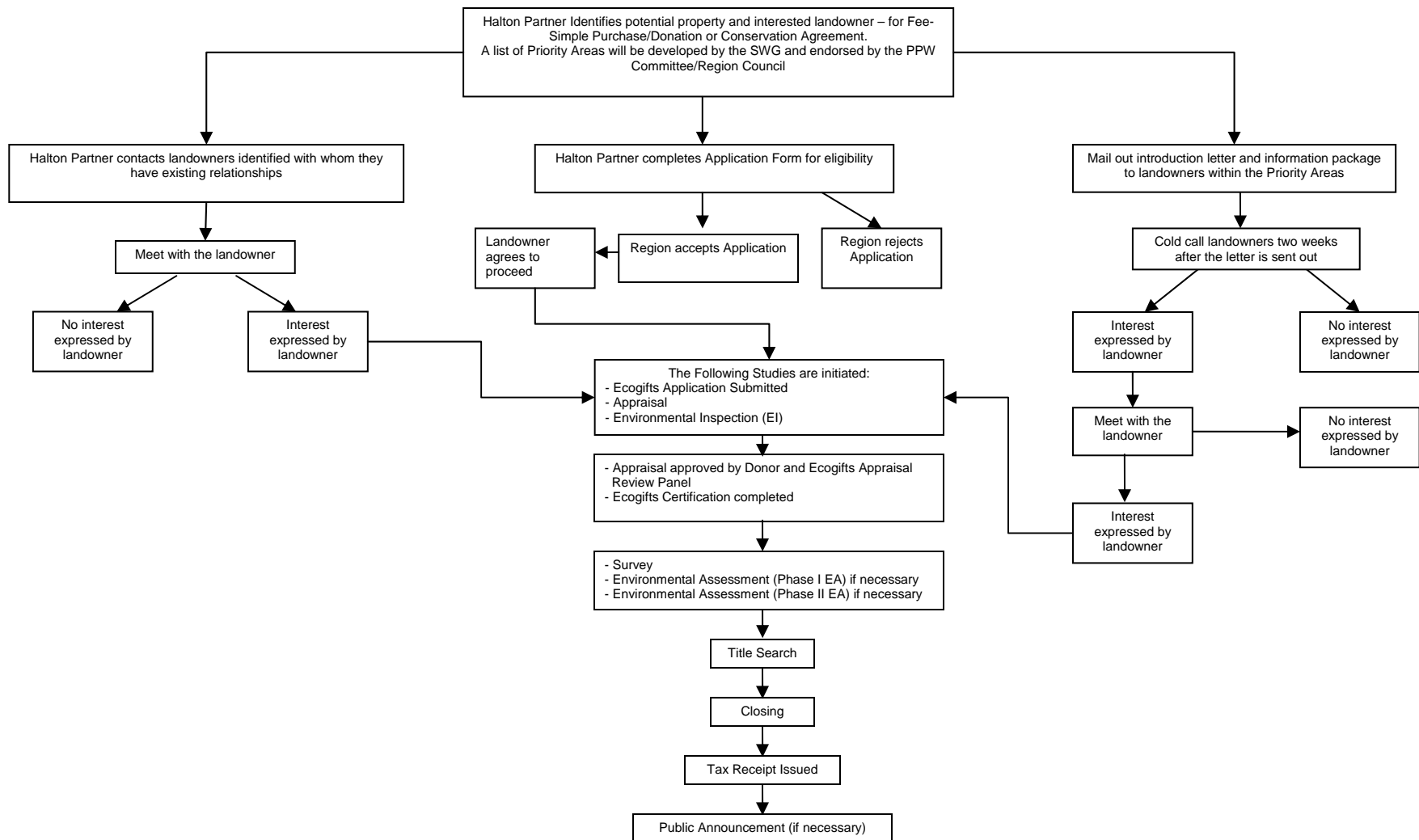
[www.conservation-ontario.ca](http://www.conservation-ontario.ca) [www.ontariolandtrustalliance.org](http://www.ontariolandtrustalliance.org)

For more information contact:

**Appendix 3: Donation and Purchase Process**

# Greenlands Securement Program

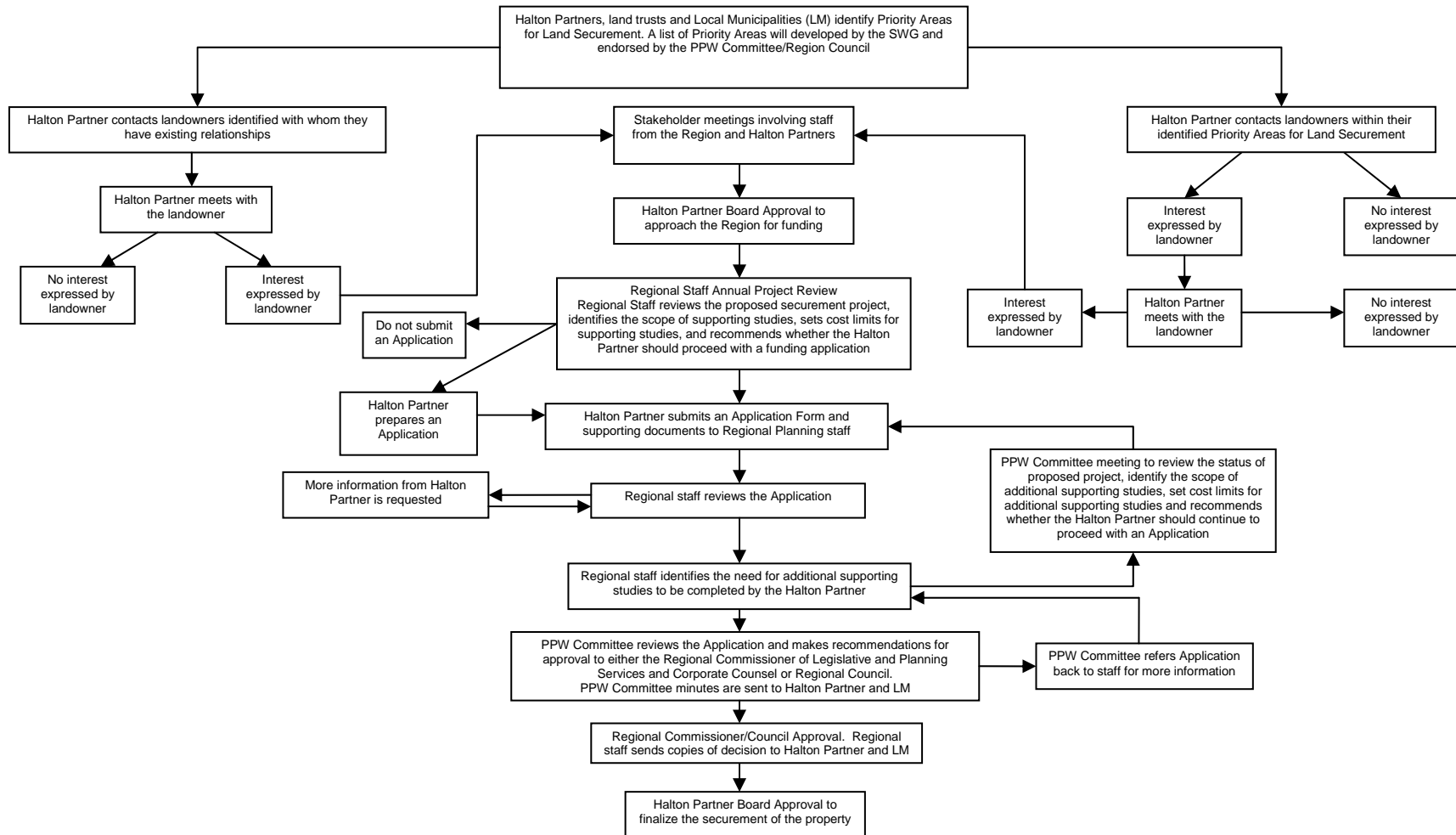
## Donation and Purchase Process



**Appendix 4: Application Process**

# Greenlands Securement Program

## Application Process



**Appendix 5: Application Form****Office Use Only:**

File Number/Property

Date Received

# Greenlands Securement Program

## 2009-2010 Application Form

**Funding Request**    original    revised

*Note: Use the tab button on your keyboard to move through text fields in this form. Use your mouse cursor to 'check' and 'uncheck' boxes.*

### 1. Applicant Information

Property Name	
Applicant/Organization	
Funding Requested	\$

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

### 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:
  - Budget
  - Property Maps
  - Title Search
  - Other (please specify):

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 project.

- 8. Additional Documentation:
  - a) Environmental Inspection Form and/or Phase I Environmental Site Assessment
  - b) Current Market Appraisal
  - c) Legal Survey
  - d) Draft of Proposed Agreement with Landowner
  - e) Comments from the appropriate Area Municipality



### 3. Property Information

Address	
Legal Description	Lot(s):                      Concession(s): Town/City:                      Regional Municipality:
Assessment Roll Number (e.g. 1234-123-123-12345)	
PIN	
Registered Plan	
Reference Plan	
Local Official Plan Designation(s)	
Regional Official Plan Designation(s)	
Zoning	

#### 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:

#### IDENTIFIED PRIORITY AREA

Has the property been identified as a Priority Area for landowner contact and securement through discussions by the Stakeholder Working Group (SWG)?

Yes       No

Is the property identified on the Halton Partner Priority Area map?

Yes       No

#### 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.).

#### LANDOWNER INFORMATION

Registered landowner(s):

Contact Information:

When did the landowner(s) acquire the property?

Year:

How did the landowner acquire the property?

Purchase       Inheritance       Other:

Beneficial Landowner(s):

Contact Information:

Corporate Contact for Beneficial Landowner(s):

Contact Information:

Is the property currently for sale?

Yes  No

If yes, indicate:

Listing Price: \$

Agent:

Contact Information:

#### 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:

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 (include dates):

#### 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).

#### 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 STEWARDSHIP**

What are the infrequent or short-term stewardship needs for this property with estimated costs? (e.g. fencing, signage, restoration etc)

Item: Estimated Cost:

What are the on-going or annual stewardship needs for this property with estimated costs? (e.g. property taxes, monitoring, insurance, conservation agreement management etc)

Item: Estimated Cost:

**STEWARDSHIP FUNDING**

Does your organization currently have the funding in place to steward this property in-perpetuity?

Yes  No

Please explain:

**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.\*

**Regional Greenlands System**

Lands within the Regional Greenlands System, which may be termed the Natural Heritage System (NHS), including lands which are identified as follows:

- Regulatory Floodplains (and associated valley and stream corridors as determined by the Conservation Authorities);
- Lake Ontario and Burlington Bay shoreline outside Regional Waterfront Parks;
- Provincially Significant Wetlands; and
- Significant Portions of the habitat of endangered and threatened species.
- Environmentally Sensitive Areas;
- Public Open Space as identified in The Parkway Belt West Plan;
- Regionally Significant Wetlands
- Provincially and Regionally Significant Areas of Natural and Scientific Interest;
- Significant Woodlands;
- Carolinian Canada Sites;
- Halton Regional Forests; and,
- Environmental Protection Areas identified in the North Aldershot Inter-Agency Review Final Report (May 1994).

**Other**

- Lands designated as Niagara Escarpment Plan "Escarpment Natural Area";
- Lands designated as Greenbelt Plan "Natural Heritage System"
- Lands identified as a priority within a strategy by a Conservation Authority or other partner agency. Specify:

\*If the property in question does not meet at least one of the above criteria please explain why it should be eligible

for program funding:

#### **b) SECONDARY CRITERIA**

Additional preference for funding eligibility is also given to properties that meet the following criteria.

- Lands contiguous to the Halton Regional Forest, Conservation Areas or other public and/or protected lands;
- Lands identified as Niagara Escarpment Plan "Escarpment Protection Area";
- Lands identified as Greenbelt Plan "Protected Countryside";
- Priority Areas for protection and/or restoration (e.g. as identified within a Watershed, Subwatershed or ESA Study and agricultural lands);
- Significant cultural/historical resource (e.g. archaeological site);
- Significant water resources (e.g. floodplain, streams, headwater area, source water area, non-evaluated wetland, estuaries);
- Trail corridor/linkage (e.g. Bruce Trail Optimum Route);
- Significant wildlife habitat;
- Regionally rare communities;
- Agricultural lands offered for:
  - o donation,
  - o significantly leveraged by funding partners,
  - o or agricultural easements;
- Lands which provide opportunity/potential for enhanced connectivity between any of the above features;
- Unopened road allowances (e.g. for conservation, trail purposes);
- Rehabilitated aggregate pits and quarries offered for donation; and
- Designated Wellhead Protection Area.
- Other:

#### **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:

Donation/Easement

- Private Dedication
- Conservation Agreement
- Bequest (Will)
- Donation
- Tradelands
- Split Receipt

Purchase

- Fee-Simple Estate
- Right-of-First-Refusal

- Option to Purchase  
 Life Interest Agreement/Lease-back Arrangements  
 Purchase/Sale Back

## Long-term Agreement

- Lease  
 Management/Stewardship Agreement

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 Agreement 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  
 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.  
 Other:

**6. Signature & Approvals**

Name:

Title:

Signature:

Approval received from your Board of Directors to apply to the Halton Region for funding?

Yes     No

Date of Approval:  
Resolution Number:

If no, provide an explanation:

Have you consulted with the Area Municipality in which the property is located?

Yes     No

If no, provide an explanation:

If yes, are comments provided by the municipality included with your application (see item F under section 8)?

Yes     No

## 7. Appendices

Please include the following with your application:

### Budget

- Complete the **Application Budget Form** provided (Microsoft Excel document) and attach.

### Property Maps

Provide maps of the property and surrounding area that includes the following features:

- Orthoimagery
- Parcel fabric
- Clear delineation of the subject property (if partial acquisition, also indicate area proposed for greenlands securement)
- Street network
- Core Areas of the Halton Region Greenlands System
- Area Municipal Official Plan environmental/natural heritage land use designations
- Priority Areas identified for land securement by the appropriate Conservation Authority or Partner
- 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.

## 8. Additional Documentation

If available, attach copies of the following documents:

- a) Environmental Inspection Form and/or Phase I Environmental Site Assessment
- b) Current Market Appraisal
- c) Legal Survey
- d) Draft of Proposed Agreement with Landowner
- e) Comments from the appropriate Area Municipality

## Submission Instructions

### Submitting Your Application

1. Complete the Application Checklist on page 1
2. Sign section 6
3. Mail your completed application package to:

Carolyn DeLoyde, M.PL, MCIP, RPP  
 Senior Environmental Planner  
 Legislative and Planning Services Department  
 Halton Region  
 1151 Bronte Road, Oakville, Ontario L6M 3L1

### Program Dates

Applications can be submitted as opportunities arise throughout the year and will be considered by the PPW Committee on a case-by-case basis.

**Additional Requirements**

Prior to submitting an application, you must obtain approval from your Board of Directors to apply to Halton Region for funding. You should also consult with the Area Municipality in which the subject property is located.

**Questions?**

For further information please contact:

Carolyn DeLoyde, M.PL, MCIP, RPP  
Senior Environmental Planner  
Telephone 905 825-6000 ext. 7554  
Email [Carolyn.Deloyde@halton.ca](mailto:Carolyn.Deloyde@halton.ca)  
Website [www.halton.ca](http://www.halton.ca)



## Greenlands Securement Program - Budget Form

<b>Property Name:</b>	
<b>Organization Requesting Funding:</b>	
<b>Date of Submission:</b>	

<b>Expenses</b>	
Purchase Price	
Easement/Long-term Agreement	
Survey	
Appraisal	
Legal Fees	
Phase I Environmental Site Assessment	
Baseline Documentation Report	
Other:	
Other:	
Other:	
Other:	
<b>Total Expenses</b>	

Note: 'Other' items may include such things as fencing, demolition, Phase II Assessments etc. that relate directly to the securement of interest in land.

<b>Funding</b> (Note: Enter pending OR confirmed but not both)				
Halton Region	Conditions/Status/Explanation	\$ Pending	Date Confirmed	\$ Confirmed
<b>Greenlands Securement Program</b>				
Additional Funding	Conditions/Status/Explanation	\$ Pending	Date Confirmed	\$ Confirmed
<b>Total</b>			<b>Total</b>	

<b>Total Halton Region Funding</b>	
<b>Total Additional Funding</b>	
<b>Total Funding (Pending + Confirmed)</b>	

**Other Comments:**



**Appendix 6: Application Evaluation Form**



**Greenlands Securement Program**

**Application Evaluation Form**

*Note: Use the tab button on your keyboard to move through text fields in this form. Use your mouse cursor to 'check' and 'uncheck' boxes.*

**Applicant Information**

Date	
Property Name	
Applicant/Organization	
Property Location	
Funding Requested	\$

**1. Program Requirements**

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Application is complete and includes all required appendices
<input type="checkbox"/>	<input type="checkbox"/>	Application satisfies all Regional requirements/standards to qualify for funding
<input type="checkbox"/>	<input type="checkbox"/>	Applicant obtained approval from Stakeholder's Board of Directors to apply for funding
<input type="checkbox"/>	<input type="checkbox"/>	Applicant consulted with the Area Municipality in which the property is located
<input type="checkbox"/>	<input type="checkbox"/>	Sufficient funds are available through the Halton Green Fund

## 2. Eligibility Criteria

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	<p><b>Primary Criteria</b> (must meet at least ONE of the following)</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Lands within the Greenlands System, which may be termed the Natural Heritage System (NHS), including lands which are identified as follows:               <ul style="list-style-type: none"> <li><input type="checkbox"/> Regulatory Floodplains (and associated valley and stream corridors as determined by the conservation authorities)</li> <li><input type="checkbox"/> Lake Ontario and Burlington Bay shoreline outside Regional Waterfront Parks</li> <li><input type="checkbox"/> Provincially Significant Wetlands</li> <li><input type="checkbox"/> Significant Portions of the habitat of endangered and threatened species</li> <li><input type="checkbox"/> Environmentally Sensitive Areas</li> <li><input type="checkbox"/> Public Open Space as identified in The Parkway Belt West Plan</li> <li><input type="checkbox"/> Regionally Significant Wetlands</li> <li><input type="checkbox"/> Provincially and Regionally Significant Areas of Natural and Scientific Interest</li> <li><input type="checkbox"/> Significant Woodlands</li> <li><input type="checkbox"/> Carolinian Canada Sites</li> <li><input type="checkbox"/> Halton Regional Forests</li> <li><input type="checkbox"/> Environmental Protection Areas identified in the North Aldershot Inter-Agency Review Final Report (May 1994)</li> </ul> </li> <li><input type="checkbox"/> Lands designated as Niagara Escarpment Plan “Escarpment Natural Area”</li> <li><input type="checkbox"/> Lands designated as Greenbelt Plan “Natural Heritage System”</li> <li><input type="checkbox"/> Lands identified as a priority within a strategy by a conservation authority or other partner agency</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	<p><b>Secondary Criteria</b></p> <p>Additional preference for funding eligibility is also given to properties that meet Secondary Criteria. These include:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Lands contiguous to the Halton Regional Forest, Conservation Areas or other public and/or protected lands</li> <li><input type="checkbox"/> Lands identified as Niagara Escarpment Plan “Escarpment Protection Area”;</li> <li><input type="checkbox"/> Lands identified as Greenbelt Plan “Protected Countryside”</li> <li><input type="checkbox"/> Priority Areas for protection and/or restoration (e.g. as identified within a Watershed, Subwatershed or ESA Study and agricultural lands)</li> <li><input type="checkbox"/> Significant cultural/historical resource (e.g. archaeological site)</li> <li><input type="checkbox"/> Significant water resources (e.g. floodplain, streams, headwater area, source water area, non-evaluated wetland, estuaries)</li> <li><input type="checkbox"/> Trail corridor/linkage (e.g. Bruce Trail Optimum Route)</li> <li><input type="checkbox"/> Significant wildlife habitat</li> <li><input type="checkbox"/> Regionally rare communities</li> <li><input type="checkbox"/> Agricultural lands offered for:               <ul style="list-style-type: none"> <li><input type="checkbox"/> donation</li> <li><input type="checkbox"/> significantly leveraged by funding partners</li> <li><input type="checkbox"/> or agricultural easements;</li> </ul> </li> <li><input type="checkbox"/> Lands which provide opportunity/potential for enhanced connectivity between any of the above features</li> <li><input type="checkbox"/> Unopened road allowances (e.g. for conservation, trail purposes)</li> <li><input type="checkbox"/> Rehabilitated aggregate pits and quarries offered for donation</li> <li><input type="checkbox"/> Designated Wellhead Protection Area</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	Conservation Linkages

<input type="checkbox"/>	<input type="checkbox"/>	Ecological Significance
--------------------------	--------------------------	-------------------------

### 3. Land Use Factors

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Land cannot be secured through the Planning Act (i.e. gratuitous dedication or conveyance)
<input type="checkbox"/>	<input type="checkbox"/>	Significant <i>natural heritage features and functions</i> are not protected by Regional/Area Municipal/Provincial land use policies and therefore could be developed
<input type="checkbox"/>	<input type="checkbox"/>	Existing and/or potential trail or corridor linkage
<input type="checkbox"/>	<input type="checkbox"/>	Has easy public access
<input type="checkbox"/>	<input type="checkbox"/>	Is contiguous to an existing park/conservation area
<input type="checkbox"/>	<input type="checkbox"/>	Risk of flooding or erosion

### 4. Value to Halton Region

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Supports <i>ROP Part IV Healthy Communities Policies 140-146</i>
<input type="checkbox"/>	<input type="checkbox"/>	Supports the <i>Region of Halton Strategic Plan</i> , Theme 2: Protect and Enhance our Natural Environment
<input type="checkbox"/>	<input type="checkbox"/>	Partners are available to help fund capital costs (hard and soft costs)
<input type="checkbox"/>	<input type="checkbox"/>	Landowner wishes to give/donate land and/or Conservation Agreement
<input type="checkbox"/>	<input type="checkbox"/>	The level of funding requested from the Region to cover necessary costs for securing the property is appropriate
<input type="checkbox"/>	<input type="checkbox"/>	Partners are available to help with the long-term management/stewardship of the property

### Conclusion

Indicate if the application has satisfied each of the following evaluation components:

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	1. Program Requirements
<input type="checkbox"/>	<input type="checkbox"/>	2. Eligibility Criteria
<input type="checkbox"/>	<input type="checkbox"/>	3. Land Use Factors
<input type="checkbox"/>	<input type="checkbox"/>	4. Value to Halton Region

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	<b>Based on the results of this evaluation, is the application recommended for funding approval?</b>

**Additional Comments**

**Evaluator**

Name:

Title:

Signature: \_\_\_\_\_

**Appendix 7: Sample Land Acquisition Agreement**

---

**LAND ACQUISITION AGREEMENT  
("AGREEMENT")**

**Between**

**THE REGIONAL MUNICIPALITY OF HALTON  
("REGION")**

**And**

**NAME OR LANDHOLDING AGENCY OR HALTON PARTNER**

**("XX")**

**ARTICLE 1: PREAMBLE AND AUTHORITY**

WHEREAS the protection, maintenance and enhancement of the quality and integrity of ecosystems is a shared responsibility between the Region, the Local Municipalities and the Halton Partner;

AND WHEREAS the Region, through Council Resolution XXXX-XXXX, has established the Halton Green Fund, and the PPW Committee through Council Resolution XXXX-XXXX to administer the Halton Green Fund. These have been established to assist the Halton Partner in achieving the goals and policies set out in the Strategy and Regional Official Plan that aim to protect, maintain and enhance key natural heritage features, functions and attributes through Land Securement tools;

AND WHEREAS the Parties acknowledge and agree that the identification, and protection of key natural heritage features, functions and attributes through Land Acquisition, as one Land Securement tool, is an important means of achieving their shared responsibility of protecting, maintaining and enhancing the quality and integrity of ecosystems as set out in Regional Official Plan Policy 2.1.3.2;

AND WHEREAS section 20(1) of the *Municipal Act, 2001*, as amended, gives the Region the power to enter into an agreement with one or more municipalities or local bodies, or a combination of both, to jointly provide, for their joint benefit, any matter which all of them have the power to provide within their own boundaries;

AND WHEREAS the Halton Partner is a local body within the meaning of section 20(1) of the *Municipal Act, 2001*, as amended;

AND WHEREAS section 21(n) of the *Conservation Authorities Act, 1990*, as amended, gives the conservation authorities the power to collaborate and enter into agreements with ministries and agencies of government, municipal councils and local boards and other organizations;

## Appendix 7: Sample Land Acquisition Agreement

---

AND WHEREAS on XX XX, 200X, Regional Council endorsed by Council Resolution XXXX-XXXX that the Region enter into an Agreement with the Halton Partner to fund and assist the Halton Partner in their identification and protection of key natural features, functions and attributes through Land Acquisition, as one tool of Land Securement, in the Region;

NOW THEREFORE, for good consideration as provided for in this Agreement, the sufficiency of which is hereby acknowledged, the Parties hereby agree as follows:

### ARTICLE 2: DEFINITIONS

- 2.1 **“Agreement”** is this Land Acquisition Agreement.
- 2.2 **“Application”** is an application under the Region’s Greenlands Securement Program.
- 2.3 **“Halton Partner”** is the official land securement partner participating in the program. These partners include conservation authorities, local municipalities, land trust and NGO’s whose mandate is to protect agricultural lands and/or ecologically significant lands for conservation purposes.
- 2.4 **“PPW Committee”** is the Planning and Public Works Committee established by the Region.
- 2.5 **“Conservation Purposes”** means objectives to protect, preserve, manage and/or restore wildlife and natural resources such as forests, soil and water as identified, without limitation, by the *Conservation Authorities Act, 1990*, as amended, and *Municipal Act, 2001*, as amended.
- 2.6 **“Costs”** are expenses reasonably incurred in connection with Land Acquisitions under this Agreement including, without limitation, title searches, current market value appraisals, survey costs, the cost of conducting environmental assessments, legal and real estate costs (Regional and third party costs), purchase price, applicable taxes, and other costs directly and indirectly incurred for the attainment of interest in land title for Conservation Purposes.
- 2.7 **“Halton Green Fund”** is a capital account, established to fund the Greenlands Securement Program involving all the land securement partners or Halton Partners.
- 2.8 **“Guidelines”** is the Greenlands Securement Strategy Implementation Guidelines which are protocols and standards intended to guide the PPW Committee and Halton Partners in preparing, receiving, reviewing and making recommendations regarding Applications submitted to the Region. The PPW Committee has the

## **Appendix 7: Sample Land Acquisition Agreement**

---

- ability to amend the Guidelines as recommended by Regional staff, subject to approval by Regional Council.
- 2.9 **“Land Acquisition”** means the attainment of interest in land title for Conservation Purposes. It encompasses, without limitation, the tools of donation, Conservation Agreements, and fee-simple purchase.
- 2.10 **“Land Securement”** means 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 Land Acquisition.
- 2.11 **“Local Municipality”** means a lower-tier municipality within the Region, consisting of the City of Burlington, Town of Halton Hills, Town of Milton and Town of Oakville.
- 2.12 **“Region”** means the geographic area within the jurisdiction of the Regional Municipality of Halton.
- 2.13 **“Regional Council”** is the governing body over the Regional Municipality of Halton.
- 2.14 **“Strategy”** is the Greenlands Securement Strategy.

### **ARTICLE 3: MUNICIPAL DISCRETION**

- 3.1 The Parties acknowledge that this Agreement shall not in any manner fetter the discretion or authority of the Region or the Halton Partner under the *Municipal Act, 2001*, as amended, the *Planning Act, 2000*, as amended, and/or the *Conservation Authorities Act, 1990*, as amended, or any other legislation or existing agreements regarding development and land use regulations.

### **ARTICLE 4: OBLIGATIONS OF THE HALTON PARTNER**

- 4.1 The Halton Partner covenant and agree to do the following:
- a. cooperate with the Region, Local Municipalities, provincial agencies, other conservation organizations and agencies and landowners to protect, maintain and enhance the quality and integrity of ecosystems in the Region through Land Securement;
  - b. adhere to the PPW Committee terms of reference and Guidelines;

## **Appendix 7: Sample Land Acquisition Agreement**

---

- c. work with the Region and the Local Municipalities to develop, maintain and annually review a priority listing of possible target properties for Land Acquisition under this Agreement in each of the respective watershed boundaries, while not excluding other opportunities for Land Securement that may arise during the term of this Agreement, which have been mutually agreed to by the Parties unless in situations for which Regional funding is not required;
- d. in identifying target properties for Land Acquisition, ensure that reasonable notice is provided to other agencies and the Region to minimize and avoid conflict and competition;
- e. prior to gathering information to complete an Application, consult with staff from the Region and/or their land securement consultant, and the appropriate Local Municipality;
- f. provide the PPW Committee with all relevant information and respond to any additional reasonable requests by the Region related to Applications from the Halton Green Fund;
- g. when Regional funding has been granted to help facilitate a Land Acquisition, obtain the written approval from the Region in accordance with the Guidelines, before commencing any land transactions;
- h. use their best efforts and to the extent possible to use Regional funding to leverage funding from other agencies to make up for any remaining balance required to complete a Land Acquisition;
- i. when funding cannot be leveraged from other agencies, provide the PPW Committee with justification why additional funding cannot be leveraged;
- j. in consultation with Region staff, may seek assistance, if available, from staff from the Local Municipalities regarding Land Acquisitions in a timely manner;
- k. conduct themselves in such a manner consistent with all laws, including, without limitation, Regional by-laws and the Regional Official Plan; and Local Municipal by-laws, Official Plans and other applicable Local Municipal policies and objectives;
- l. register on title any interest in acquired lands in the name of the Halton Partner, or unless otherwise agreed to by the Parties;
- m. provide documentation of all expenditures related to Land Acquisitions under this Agreement to the PPW Committee;
- n. in cooperation with staff from the Region and Local Municipalities, prepare annual business plans and cases that include performance indicators as



## **Appendix 7: Sample Land Acquisition Agreement**

---

described in the Guidelines to justify continued Regional funding for the purpose of this Agreement; and

- o. the properties secured with Regional funding be held by the Halton Partner in perpetuity for conservation. Should the Halton Partner in future ever deem it necessary to dispose of such a property must first offer the property to the Region or other applicable land trust or government organization with similar conservation mandate, such as, Ontario Heritage Trust, Ontario Parks, Parks Canada, for \$2.00. If the Region accepts the land, the Halton Partner, as owners of properties acquired under this Agreement through fee simple purchase, hereby agree and consent to such rights as required by the Region in accordance with the terms of this Agreement to be registered against title to acquired properties, the cost of such registration to be at the expense of the Region.

### **ARTICLE 5: OBLIGATIONS OF THE REGION**

5.1 The Region covenants and agrees to do the following:

- a. cooperate with the Halton Partner, Local Municipalities, provincial agencies, other conservation organizations and agencies and landowners to protect, maintain and enhance the quality and integrity of ecosystems in the Region through Land Securement;
- b. adhere to the PPW Committee terms of reference and Guidelines;
- c. work with the Halton Partner and the Local Municipalities to develop, maintain and annually review a priority listing of possible target properties for Land Acquisition in each of the respective watershed boundaries, while not excluding other opportunities for Land Securement that may arise during the term of this Agreement, which have been mutually agreed to by the Parties;
- d. through Regional Council Resolution **XXXX-XXXX**, cause the PPW Committee to:
  - i. develop the Guidelines for receiving and making recommendations regarding Applications made by the Halton Partner under this Agreement and amend those guidelines as necessary, in consultation with the Halton Partner and Local Municipalities;
  - ii. request and review all relevant information, including the recommendations from the Halton Partner, related to Land Acquisition under this Agreement for the purpose of making appropriate recommendations to the appropriate approval authority;
  - iii. make recommendations on all Applications made by the Halton Partner under this Agreement to the appropriate approval authority,

## **Appendix 7: Sample Land Acquisition Agreement**

---

and report back to Regional Council, the Halton Partner and appropriate Local Municipality; and

- iv. generally, but without limitation, to provide up to 50% of the required funding, where appropriate, to the Halton Partner from the Halton Green Fund to be used to leverage funding from other funding partners in order to offset Costs necessitated by Land Acquisition transactions; and
- v. encourage the Halton Partner and Local Municipalities to enter into agreements with each other to support the policies of the Region, Local Municipalities and the Halton Partner to protect, maintain and enhance the quality and integrity of ecosystems in the Region.

### **ARTICLE 6: STAFF SUPPORT**

- 6.1 Based on the direction of the PPW Committee, the Halton Partner shall be responsible for obtaining legal and real estate services, either through the Region or a third party, to carry out Land Acquisitions under this Agreement.
- 6.2 The parties acknowledge that Regional staff may be in a conflict of interest when acting for the Halton Partner and the Region. The Halton Partner and the Region hereby acknowledge that in some situations a conflict may exist and deem this Agreement as adequate disclosure of the potential conflict of interest and hereby agree that Regional staff may continue to act, at the sole discretion of the Regional Legal staff. The parties hereby acknowledge that the potential conflict has the effect of invalidating the protection of lawyer and client privilege and that information provided by one party may not be held in confidence from the other party. It is in the sole discretion of the Regional Legal staff to determine if Regional staff can continue to work on behalf of the Halton Partner. If the Regional Legal staff determines that the Regional staff cannot, as a result of a conflict, act on behalf of the Halton Partner, the Regional staff will discontinue working on behalf of the Halton Partner and the Halton Partner shall retain third party professional services to represent the interests of the Halton Partner and the Regional staff shall continue to act on behalf of the Region, and the Halton Partner shall not object to same.

### **ARTICLE 7: FUNDING**

- 7.1 Where applicable, Regional funding will be obtained from the Halton Green Fund for the purpose of facilitating Land Acquisitions by the Halton Partner under this Agreement to cover all or part of required Costs.
- 7.2 Withdrawals of any funds from the Halton Green Fund under this Agreement shall be subject to the recommendation of the PPW Committee and appropriate approval. The appropriate approval authority for Applications up to \$100,000 will

## **Appendix 7: Sample Land Acquisition Agreement**

---

- be the Commissioner of Legislative and Planning Services and Corporate Counsel of the Region, with subsequent reporting to Regional Council. Applications of \$100,000 and greater will require Regional Council approval
- 7.3 The Guidelines, developed by the PPW Committee and approved by Regional Council, will be used for reviewing and making recommendations regarding Applications made by the Halton Partner under this Agreement.
- 7.4 The PPW Committee and/or the Commissioner of Legislative and Planning Services and Corporate Counsel of the Region can refer any particular Application at anytime when appropriate to Regional Council for their consideration. The decision of Regional Council regarding an Application made by the Halton Partner under this Agreement is final.
- 7.5 Annual funding for Land Acquisition under this Agreement is subject to the decision of Regional Council and the recommendation of the Regional Treasurer and the PPW Committee.
- 7.6 The Region maintains the right to audit all financial transactions related to Land Acquisitions under this Agreement.

### **ARTICLE 8: TERM AND IMPLEMENTATION**

- 8.1 The term of this Agreement shall be for a period of five (5) years from the date last executed. The Parties can agree to renew this Agreement for further five-year terms.

### **ARTICLE 9: SEVERABILITY**

- 9.1 If any provision of this Agreement is determined by a court of competent jurisdiction to be invalid, illegal, unenforceable in any respect, such determination shall not impair or affect the validity, legality or enforceability of the remaining provisions.

### **ARTICLE 10: AMENDMENTS, WAIVERS AND TERMINATION**

- 10.1 The Halton Partner releases and discharges the Region, its officers, employees, agents, contractors, invitees, representatives, and elected and appointed officials from every claim of any kind, including but not limited to any claim for liability, that anyone may make, suffer, sustain or incur relating to this Agreement or its use after the Land Acquisition is completed. The Halton Partner shall indemnify and save harmless the Region from every claim of any kind, including but not limited to any claim for liability, and any obligations, damages, costs, suit, claim, demand, fine, action or proceeding of any kind for which the Region may be come liable or suffer (including without limitation claims from any governmental authority such as the Ministry of the Environment) by reason of this Agreement or

## **Appendix 7: Sample Land Acquisition Agreement**

---

its use, or the breach of or non-performance by the Halton Partner of any provision of this Agreement or any violation by the Halton Partner or those for whom it is in law responsible of any laws, bylaws, rules or regulations which may be applicable in connection with the Agreement or its use and for any wrongful or negligent act or omission by the Halton Partner or those for whom it is in law responsible in connection with this Agreement or its use, including any negligence by the Region, its officers, employees, agents, contractors, representatives, and elected and appointed officials or invitees. The Halton Partner shall be responsible for and pay the total costs and expenses that the Region may incur in relation to any claim made after the Land Acquisition is completed.

- 10.2 No amendment or waiver of any provision of this Agreement shall be binding on any Party unless consented to in writing by such Party. No waiver of any provision of this Agreement shall constitute a waiver of any other provision, nor shall a waiver constitute a continuing waiver unless otherwise provided.
- 10.3 The Halton Partner may terminate this Agreement as against the Region at the Halton Partner's discretion, however, if the Halton Partner terminates this Agreement the Region shall have no further obligation for funding or otherwise in relation to any applications made and may not have yet been completed and the Region shall no longer accept any further applications from the Halton Partner.
- 10.4 Termination of obligations under this Agreement by the Halton Partner shall not in effect terminate the obligations of the other Parties, unless otherwise agreed upon by the Parties.
- 10.5 The Region reserves the right to terminate this Agreement as against the Halton Partner at the Region's sole and unfettered discretion, such termination however shall not act to cancel or rescind any approvals and funding authorizations which may have been previously approved by Regional Council prior to the date of termination and where the associated Land Acquisition may not yet have been completed. Notice of termination in writing is to be served on the Halton Partner as provided for in Article 11.2 herein.
- 10.6 Termination of obligations under this Agreement shall be made in writing and submitted to the Regional Clerk of the Region and delivered to all parties in accordance with Article 11.2 hereof.

### **ARTICLE 11: GENERAL**

- 11.1 This Agreement shall enure to the benefit of and be binding upon the Parties hereto and their respective successors and assigns.
- 11.2 Any notice, demand, acceptance or request required to be given hereunder in writing, shall be deemed to be given if either personally delivered or mailed by registered mail, postage prepaid, (at any time other than during a general

**Appendix 7: Sample Land Acquisition Agreement**

---

discontinuance of postal services due to a strike, lockout or otherwise) and addressed to the Parties as follows, or such change of address as the Parties have by written notification forwarded to each other:

To the Region at:

The Regional Municipality of Halton  
1151 Bronte Road  
Oakville, ON L6M 3L1  
Attention: Regional Clerk

To Halton Partner at:

Halton Partner  
Address:  
Attention: Contact Person

Any notice shall be deemed to have been given to and received by the Party to which it is addressed if personally delivered, on the date of delivery; or, if mailed, then on the fifth business day after the mailing thereof.

11.3 Should there be a conflict between this Agreement, or this Agreement as it may be amended from time to time, and the Guidelines, the terms of this Agreement shall be paramount.

IN WITNESS WHEREOF each of the Parties hereto has duly executed this agreement by the hands of their officers, duly authorized in this regard this        day of        , 2009.

**The Regional Municipality of Halton (“Region”)**

Per: \_\_\_\_\_

Per: \_\_\_\_\_

I/We have authority to bind the Region.

**Halton Partner (“Halton Partner”)**

Per: \_\_\_\_\_

**Appendix 7: Sample Land Acquisition Agreement**

---

Per: \_\_\_\_\_

I/We have authority to bind the Halton Partner.

Per: \_\_\_\_\_

Per: \_\_\_\_\_

I/We have authority to bind the Halton Partner.

**Appendix 8: Environmental Inspection Form**

## Greenlands Securement Program (GSP) Environmental Inspection Form

*Note: Use the tab button on your keyboard to move through text fields in this form. Use your mouse cursor to “check” and “uncheck” boxes.*

<b>Date</b>	
<b>Property Name</b>	
<b>Applicant/Organization</b>	
<b>Property Location</b>	
<b>Municipal Roll Number (e.g. 1234-123-123-12345)</b>	
<b>Acres/Hectares</b>	

Halton Region requires that the Halton Partner submit an Environmental Inspection Form for every property proposed for securement under the Program. This Environmental Inspection Form must be completed to document your evaluation of the property. Please complete the form as fully as possible after conducting your site visit. Identify the source of specific information throughout the form whenever appropriate and add additional pages/information where necessary. This form must be signed by the preparer and the reviewer.

### 1. Information Sources

Listed below are some sources of information which you may have consulted in completing your inspections. Please check those you utilized and provide details.

<b>Interviews</b>
<input type="checkbox"/> Landowner: <input type="checkbox"/> Regional Officials (fire, health, building, land use, environmental): <input type="checkbox"/> Other:
<b>Aerial Photography &amp; Ortho Imagery</b>
<input type="checkbox"/> Current – Year(s): Source: <input type="checkbox"/> Historical – Year(s): Source:
<b>Mapping</b>
<input type="checkbox"/> Topographic:

<input type="checkbox"/> Neighbourhood zoning maps/land use maps: <input type="checkbox"/> Other:
<b>Additional Resources</b>
<input type="checkbox"/> Chain of title history: <input type="checkbox"/> Title Report: <input type="checkbox"/> Building specifications/plans: <input type="checkbox"/> Government records: <input type="checkbox"/> Previous Environmental Assessments: <input type="checkbox"/> Other:

## 2. Property Inspections

List the property inspections that were conducted and describe the method(s) used (walked perimeter, entered buildings, drove passable roads, flew interior, etc.)

No.	Date	Duration	Persons Present	Location/Extent	Method(s)
1					
2					
3					
4					

## 3. Property History and Past Use

<b>Uses</b>
List all known historical and current uses of the property (e.g. agricultural, manufacturing, undeveloped land, etc.). Identify all known owners/operators. Include dates and time periods as appropriate.
<b>Buildings &amp; Structures</b>
List all buildings and structures on the property. Describe their condition, use and locate them on the property sketch.

## 4. Property Condition

<b>Disturbances</b>
Indicate if any of the following were observed during property inspections. Provide details for all 'checked' items and located them on the attached Property Map (see section 6).



Distressed vegetation:  
 Bare areas:  
 Unusual odours:  
 Stains (unusual or near chemical storage/usage areas):  
 Dumping:  
 Debris:  
 Drains:  
 Unusual depressions/mounds:  
 Unusual sheens/colours on water surfaces:  
 Piping/vents (for underground storage tanks):  
 Other:

**Transformers**

Are there any transformers (pole-mounted or pad-mounted) located on the property?  
 Yes    No

If Yes, provide details:

**Drainage**

Are there any pits, ponds, lagoons, clarifiers, oil/water separators, surface impoundments, or sumps on the property?  
 Yes    No

If Yes, provide details:

**Drums**

Are there any storage drums on the property?  
 Yes    No

If Yes, provide details:

**Tanks/Wells**

Are there past or present storage tanks on the property (above or below ground)?  
 Yes    No

If yes, provide details:

Does the property contain any septic tanks or fields?  
 Yes    No

If yes, provide details:

Are they in use or abandoned?  
 Yes    No

Did the septic tanks or fields receive any industrial materials?  
 Yes    No

If yes, provide details:

Are there any wells on the property?

Yes  No

If yes, provide details (type, use and condition):

Are the wells locked or protected?

Yes  No

If yes, provide details:

Has the well water ever been tested?

Yes  No

If yes, provide details and attach test results:

Have there been any complaints about the quality of the water or flow rate?

Yes  No

If yes, provide details:

### Mineral/Petroleum Operations

Have there ever been any oil or gas wells or other mining activities on the property?

Yes  No

If yes, provide details:

### Radon

Has a radon test been performed in any building on the property?

Yes  No

If yes, provide details:

### Asbestos

Is there any evidence of materials that are likely to contain asbestos (check roof, exterior, pipe coverings, spray-on fire proofing, and cement sheet)?

Yes  No

If yes, provide details:

### Fill/Grading

Has fill ever been brought on to the property?

Yes  No

If yes, provide details and indicate where it was placed and when and where it came from:

Has there been any grading or disturbance to the soil?

Yes  No

If Yes, provide details:

### Chemicals<sup>1</sup>/Waste Disposal/Spills

<sup>1</sup>Consider "chemicals" to mean industrial materials and such products as cleaning compounds, lubricating agents, greases, oils, heating fluids, gasoline, pesticides, herbicides, fertilizers, metals). If so, indicate the types of chemicals, how they were used, and where and how they were stored

Have any chemicals been used on the property?

Yes  No

If Yes, provide details:

Has the property ever contained any areas used to dispose of waste?

Yes  No

If Yes, indicate the kinds of materials disposed of below and **describe the method** of disposal (e.g. burning, discharge to water body, dump, land farming, landfill, recycled, settling ponds, surface impoundment, etc.). Locate checked materials on the property sketch.

- Appliances:
- Asbestos:
- Automobiles:
- Chemicals:
- Construction debris:
- Garbage (food wastes):
- Household trash:
- Incinerator ash:
- Industrial wastes (identify type):
- Mining wastes:
- Pesticide or herbicides:
- Pesticides or herbicide containers:
- Petroleum products:
- Sewage sludge:
- Tires:
- Other:

How long and when were these materials used on the property?

Has there ever been a chemical spill or leak on this property?

Yes  No

If Yes, indicate what was spilled, where it was spilled, how much was spilled and what actions were taken in response:

Have there been any chemical spills or leaks on adjacent property or in the surrounding area?

Yes  No

If Yes, provide details:

## 5. Studies/Records/Enforcement

### Previous Inspections

Have any previous environmental assessments/tests/samplings/ impact statements been conducted for the property?

Yes  No

If Yes, provide details:

### Government Communication

Has the current landowner had any communications with any government agency concerning environmental conditions on the property?

Yes  No

If Yes, provide details:

### Violation History

Have any government officials ever investigated, cited, or been involved with any violations of any environmental law at this property or on property in the immediate vicinity?

Yes  No

If Yes, provide details:

Does this property or any property within one-half mile appear on any list of "problem" sites that is maintained by any environmental agency?

Yes  No

If Yes, provide details:

## 6. Property Map

Insert or attach a map of the property area covered by this assessment (and adjacent property, if appropriate). Delineate bodies of water, swamps, wetlands, wells, improvements, structures, human-made features and any areas of concern noted in this assessment. Identify those areas that you physically inspected (e.g. paths walked, roads driven, etc.)

## 7. Conclusion

Based on this inspection is a Phase I Environmental Site Assessment necessary?

Yes  No

Provide details:

**8. Signatures**

\_\_\_\_\_  
Preparer:

Date:

\_\_\_\_\_  
Landowner:

Date:

\_\_\_\_\_  
Reviewer:

Date:

**Appendix 9: Commissioner Approval Form****Greenlands Securement Program****Commissioner Approval Form***Commissioner of Legislative and Planning Services and Corporate Counsel*

*Note: Use the tab button on your keyboard to move through text fields in this form. Use your mouse cursor to 'check' and 'uncheck' boxes.*

Attention	<b>Mark G. Meneray</b> <b>Commissioner of Legislative and Planning Services and Corporate Counsel</b> <b>Region of Halton</b>
From	
Date	
Property Name	
Applicant/Organization	
Property Location	
Securement Type	

**Recommendation**

That the Regional Commissioner of Legislative and Planning Services and Corporate Counsel approve the above-referenced property and grant funding to the applicant under the Greenlands Securement Program in the amount of \$ \_\_\_\_\_, less than 50% of the total required funding to secure the property and no greater than \$100,000.

And further that, the funds for the acquisition be granted from the Halton Green Fund.

**Approvals**

I hereby confirm that funding is available for the above-referenced application, the proposed land securement project contributes to the protection and enhancement of the Regional Greenlands System (which may be termed the Natural Heritage System), the Halton Partner has satisfied the requirements of Regional staff and the PPW Committee recommends to the Commissioner of Legislative and Planning Services and Corporate Counsel, approval of the funding request.

\_\_\_\_\_  
Mark. G. Meneray  
Commissioner of Legislative and Planning  
Services and Corporate Counsel  
Region of Halton

\_\_\_\_\_  
Ron Glenn  
Director of Planning Services  
Region of Halton

**Property Description**

Map attached

**Project Summary**

**Conditions of Approval**

The following conditions must be met to the satisfaction of Regional staff prior to the release of Regional funding: