

## Appendix 3B

### THE NATURE CONSERVANCY OF CANADA GUIDELINES FOR THE REVIEW AND ACCEPTANCE OF PROPERTY DONATIONS

#### GUIDELINES FOR REVIEW AND ACCEPTANCE OF PROPERTY DONATIONS<sup>1</sup>

##### **GUIDELINES: (Note: at least one of the following must be met)**

1. Meets NCC Site Selection (ecological) Criteria.
2. Securement of property will ensure protection of adjacent, more ecologically significant area.
3. Donor of property is willing to establish endowment fund, provide irrevocable Planned Gift, property generates annual revenues, or project is funded under existing program.
4. NCC is facilitating the transfer of natural area to another agency, subject to standard land transfer agreements (to be completed within one year)
5. Property qualifies as “Trade Land”<sup>2</sup>
6. Corporate benefits (e.g. increased public recognition)

##### **REVIEW AND APPROVAL PROCESS**

1. Staff review background information on file in house, or with other conservation agencies, regarding documented significance of property or the larger natural area.
2. Staff arrange for a site visit to be conducted by member of SAN or equivalent, to undertake preliminary property evaluation, including consideration of potential toxic contamination – Ecological Assessment completed and reviewed. Staff seek recommendation from member of Scientific Advisory Committee or Conversation Data Centre
3. Staff request Letter of Intent to Donate, copy of Deed of Land and tax assessment from potential donor.
4. Staff authorize preliminary title search provided that the property:

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<sup>1</sup> “Property Donations” include fee simple donations of land and donations of conservation easements, covenants and servitudes.

<sup>2</sup> “Trade Land” refers to fee simple donations where the donor has agreed to permit the NCC to use the property as an asset with the sale of the property generating revenue for NCC general use. Trade Lands must not be certified “ecologically sensitive” under the *Income Tax Act (Canada)*

- Meets either consideration (1), (2), or (3) of the guidelines, and approval of the Scientific Advisory Committee or CDC; or
  - Meets consideration (4) or (5)
5. Staff draft necessary documents (conservation agreement, life interest agreement, etc.) and authorize appraisal by certified local appraiser, utilizing standard Request for Appraisal Services form
  6. If necessary/requested, staff proceed with certification of property “ecologically sensitive” through certifying agency (note all donations of conservation easements or covenants where a charitable tax receipt is to be issued require certification)
  7. Staff arrange for transfer of property, execution of agreements and/or future disposition (if applicable) and management
  8. Staff provide periodic updates, and notify Executive Committee upon completion of transaction

For properties which do not meet NCC site selection criteria, but may have benefits from a corporate perspective, or for those donations for which there is to be no accompanying endowment fund, Planned Gift, generation of annual revenues, or existing program funding, staff seek a recommendation from the Executive Committee on whether or not to accept a property.