

*American Friends
of Canadian Land Trusts*

Grantee Application Form

Sept 2010

APPLICATION CHECKLIST

Thank you for your interest in becoming a grantee with the American Friends of Canadian Land Trusts (AF). This Grantee Application Checklist includes information requests for those organizations that wish to be eligible to receive financial grants (Part I) as well as those organizations wishing to become eligible to receive gifts of land, or partial interest in land (easements, covenants, servitudes, remainder interests) (part II). In order to initiate your application process please complete and send us the following items:

All Grantee Applicants:

- Part I Application and Nonprofit Equivalency form
 - Copy of organization's registration documents, incorporation paper or other governance documents
 - Documentation verifying charitable status in Canada
 - Organizational budget and financial statement
 - List of Board of Directors, Senior Advisors and Staff
- Signed Grant Agreement
- Grantee Initiation Fee (if not paid already)
 - General Support Program Only (for cash grants): \$350 USD
 - Conservation Land Program Only (for land/easement grants)-\$500 USD
 - Grantee for both programs: \$800 USD

Additional requirements for grantees also wishing to be eligible to receive donations of land/interest in land

- Part II Application
 - For grantees anticipating grants of conservation easements, copy of IRS ruling letter verifying status as a publicly-funded charity, not a private foundation (information on how to proceed is provided in a fact sheet available from AF)
 - Copy of Board resolution adopting CCOA Standards and Practices (if applicable)
 - Copy of documentation verifying organization is eligible under the federal Ecological Gifts program to receive Ecological Gifts (if applicable)

Please send your completed application to:

American Friends of Canadian Land Trusts
P.O Box 4482
Seattle, Washington 98194 USA

Please note: *The tax deductibility of donations made to AF would be jeopardized by any advance guarantees made with respect to the disposition of grants or properties to a Canadian conservation organization. To protect the donor's potential charitable deduction for their gift, AF has structured its receipt of donations, and its granting of cash or land/easements to be two entirely separate processes. The board is grateful for your interest in AF and in the conservation of Canada's resources.*

Part I

GRANTEE APPLICATION FORM

Please answer the following questions so that we may determine whether your organization meets **in form and spirit** the following criteria, used to determine grantee status with the American Friends of Canadian Land Trusts (AF).

Your answers will not automatically qualify or disqualify you for a grant. Nor does this application guarantee gifts of conservation land or interest in land will be tax deductible in the U.S.

Name of Organization: _____

Mailing Address: _____

Telephone: _____

Fax: _____

Email: _____

Contact: _____

Title: _____

Please give a brief description of your organization and its current activities (100 words maximum please):

1. Is the purpose of the organization conservation and protection of land, or is this one of the primary activities of your organization? Yes No

2. Is your organization a government or quasi-government entity? Yes No
3. Is your organization operated exclusively for charitable purposes? Yes No

If yes, please provide a copy of documentation verifying charitable or other status (e.g. non-profit).

4. Is your organization a member of the Canadian Land Trust Alliance? Yes No
5. Is your organization organized as a corporation? Yes No

If yes, please provide a copy of your organization's registration documents, incorporation papers or other governance and tax exemption documents.

If no, what is the form of your organization?

6. Does your organization carry out lobbying activities, or attempt to influence legislation? Yes No

If yes, briefly describe these activities and estimate the proportion of time/budget allocated to such activities:

7. Does your organization attempt to influence the outcome of political campaigns by candidates for public office? Yes No

If yes, briefly describe these activities and estimate the proportion of time/budget allocated to such activities:

8. Is your organization required by law to apply its profits (revenues in excess of expenses) to the furtherance of its stated purposes? Yes No
9. Does any part of the assets of your organization, now or planned for the future, inure to the benefit of private individuals, other than in the form of services that your organization is authorized to provide and is fairly compensated for? Yes No

If yes, please explain:

10. Does your organization make any payments to any of its officers or members of its Board of Directors or other governing body, other than reasonable compensation for services to the organization, including reimbursement for expenses? Yes No

If yes, please explain:

11. Upon dissolution, must your organization's assets be distributed for charitable and conservation purposes? Yes No

12. Is your organization controlled by or operated in connection with any other organization? Yes No

If yes, please list the names of such organizations and the nature of such control or connection:

13. What is the estimated annual amount of cash or cash equivalent (i.e. donations of stock etc.) you expect to be donated to the AF on an annual basis that may support your activities?

_____.

14. Please provide a list of the use(s) to which any funds received will be put (e.g., support of land conservation activities conducted in Canada)

15. Please provide an organizational budget and financial statement (balance sheet and income/expense statements).

16. Please provide a list of Board of Directors, Senior Advisors and Senior Staff

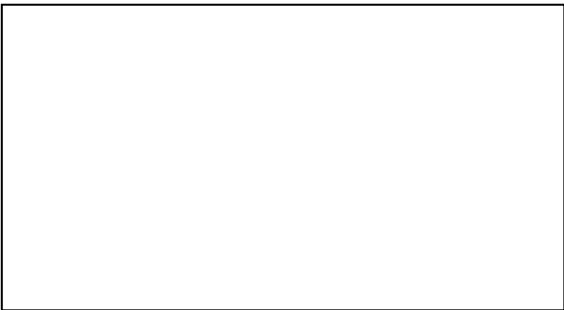
The undersigned officer or authorized representative of the organization affirms that the foregoing statements are complete and accurate:

Organization Name

Name of Officer or Representative Title

Signature of Officer or Representative Date

OFFICIAL SEAL OR STAMP:



Grant Agreement

Should your organization be deemed eligible as an American Friends of Canadian Land Trusts (AF) grantee under its Cross-Border Conservation Program, all grants are subject to certain conditions. Please read and sign the conditions outlined below, and indicate that your organization agrees to the following terms and conditions by signing and returning this form.

The conditions of any AF grant provided to an eligible grantee are as follows:

1. Grants must be used exclusively for land conservation activities conducted within Canada.
2. Any portion of a Grant not used for the stated purpose must be repaid to AF.
3. Your organization agrees to submit to AF a report describing the use of the funds and activities undertaken as a result of any Grant, and to do so in a timely manner.
4. Your organization agrees that it shall not use any portion of a Grant to make grants to individuals on a non-objective basis, nor for any non-charitable or non-educational purpose. It shall not use funds to participate in or intervene in (including the publishing or distribution of statements) any campaign on behalf of (or in opposition to) any candidate for public office; or fund any specific voter registration drive that is conducted in a manner that favors a particular candidate or slate of candidates. It shall not knowingly permit any portion of a Grant to be used to promote or support violence or terrorism.
5. Your organization agrees to notify AF immediately, in writing of any change in its charitable status, its executive staff or key staff, or any other major changes in its program. If a fiscal sponsorship is involved, your organization will promptly notify AF of any changes in the sponsorship agreement or in the sponsor/project relationship.
6. All expenditures made for the purposes of a Grant shall appear in your organization's financial records, which will be made available to AF at reasonable times upon request.

Please note, accepting the above terms and conditions does not guarantee that any Grant will be awarded.

IN WITNESS WHEREOF, this Grant Agreement is signed

Organization Name

Name of Officer or Representative

Title

Signature of Officer or Representative

Date

Part II

If your organization expects to apply for grants of land, easements, covenants (or other gifts of partial interest in land) from AF please complete the remaining questions in addition to the questions in Part I.

Please note: In collaboration with Canadian conservation organizations, American Friends of Canadian Land Trusts (AF) wants to help conserve significant natural, historical, cultural, recreational and scenic lands that are located in Canada and owned by US taxpayers. As a small, volunteer run organization AF must be very strategic in its choice of projects. Accordingly, AF is seeking properties that are considered very high priority by those Canadian conservation organizations that are thoroughly acquainted with the area in which the targeted land is located, and with the specific tract proposed for protection. Only properties with marketable title that are free of liability concerns can be accepted by AF.

We look to our Canadian conservation partner for completing all land procurement, stewardship and management activities (regardless of who holds title/easement). All costs related to both procurement and stewardship are the responsibility of the Canadian conservation organization and/or donor.

AF's mission is best served by conveying conservation lands and easements it receives from US residents to qualified conservation organizations in Canada. However, the tax deductibility of donations made to AF would be jeopardized by any advance guarantees made with respect to AF's disposition of properties received by AF. To protect the landowner's/donor's potential charitable deduction for their gift of land or partial interest in land, AF has structured its land acquisitions and dispositions to be two entirely separate processes. The Board is grateful for your interest in AF and in the conservation of Canada's resources.

1. Is your organization eligible to receive Ecological Gifts under the Federal Ecological Gifts Program? Yes No

If yes, please provide a copy of documentation verifying that the organization is eligible under the federal Ecological Gifts program to receive ecological gifts.

2. Has your organization adopted the land trust standards and practices of the Canadian Land Trust Alliance? Yes No

If yes, please provide a copy of Board resolution adopting CCOA Standards and Practices

3. Do you have a ruling letter from the IRS stating your status as a publicly-funded charity as opposed to a private foundation? Yes No

If yes, please submit a copy of your IRS ruling letter (please see AF factsheet for support in completing your application—available at www.nsnt.ca/af).

(please note—such status is required only if the potential grantee organization wishes to be eligible to receive transfers of partial interest in land from AF. It is not required for cash grants from AF, or transfers of land from AF).

4. Please describe the staff/volunteer/Board resources available to your organization that will support land acquisition and stewardship.

5. Please describe your organization's land stewardship program and capacity. Use specific examples of your current stewardship projects, programs and polices.

6. Please provide a brief description of your organization's background, including:

Mission statement:

History of protecting conservation lands

Portfolio of conservation properties

Annual conservation budget

Stewardship fund amount, and policies that govern use of the funds

Key land conservation activities and programs (Strategic Plan)