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## LCBO Natural Heritage Fund – Application for Funding Guidelines



### Introduction

The LCBO's commitment to the environment and community is supported by the LCBO's Natural Heritage Fund (NHF). The NHF provides funding for projects that offer positive, tangible and lasting benefits to communities while aiming to enhance, restore or improve Ontario's natural heritage systems and features. The LCBO allocates a portion of the proceeds from the sale of reusable bags and from in store tastings to the NHF. Overall, the NHF is intended to provide financial support to not-for-profit organizations looking to strengthen their community through the protection and preservation of Ontario's natural capital.

### What is the LCBO Natural Heritage Fund?

The LCBO Natural Heritage Fund provides funds for community-based environmental initiatives throughout Ontario. Allocations typically vary depending on the project. Projects can range from habitat protection & restoration, land stewardship & conservation, species at risk or education & awareness. Projects that have been funded to date have included:

- Returning Atlantic Salmon to Lake Ontario and its tributaries,
- A breeding program for the endangered Eastern Loggerhead Shrike songbird,
- Re-establishment of Bald Eagles in the Thousand Islands region,
- Frog habitat and wetland restoration, and
- Carolinian forest improvement in southwest Ontario.

### Who Is Eligible?

Only not-for profit organizations in Ontario are eligible to receive funding from the NHF. ***Please note: LCBO reserves the right to determine, in its sole discretion, the eligibility of any project or organization.***

In order to receive funding, a project must:

- Either directly benefit the environment (action-oriented) or increase a community's capacity to act on environmental issues (capacity-oriented),
- Have results that can be both monitored and measured.
- Be complete within a one year time frame,
- Must be carried out in the Province of Ontario.

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The following types of projects and activities are not eligible for NHF funding:

- Exclusive private land stewardship initiatives\*
- Lobbying or advocacy activities
- Projects geared towards cosmetic enhancements only
- Activities required by law or mandated by government
- Fundraising initiatives
- Personal or group expeditions or recreation

\* Projects that include restoration or enhancement of private land as a *component* of the overall project are eligible. Projects that are exclusive to private land stewardship initiatives are ineligible.

In addition, applicants are encouraged to include an opportunity for volunteer participation by an LCBO employee or employees or an LCBO supplier.

For example, projects and activities that could be funded by the NHF could include the following:

<b>Project Examples</b>	<b>Measureable Result</b>
<ul style="list-style-type: none"><li>• Creating/restoring wetland</li><li>• Events designed to raise awareness resulting in community action to preserve/enhance environmentally sensitive geographic areas</li><li>• Reintroduction of Species at Risk</li><li>• Restocking programs</li><li>• Reforestation</li><li>• Dissemination/documentation of Traditional Ecological Knowledge</li><li>• Mitigating Invasive Species</li></ul>	<ul style="list-style-type: none"><li>• Hectares created/restored</li><li>• Number of volunteers; number in attendance, media coverage, signed agreements committing to action;</li><li>• Number of breeding pairs introduced;</li><li>• Number of fingerlings released</li><li>• Number of trees planted</li><li>• Number of seminars, number of people attending, method of documentation</li><li>• Number of invasive species removed, size of area treated</li></ul>

## **Expenditure Restrictions**

The maximum funding that may be requested is \$5,000. The LCBO reserves the right to issue a grant for less than the full amount requested.

Funds received from the Natural Heritage Fund cannot be used for the following:

- Salary or mandatory employee costs
- Scholarships, grants or bursaries
- Administrative or capital costs
- Consultants
- Mileage or meal costs
- Any payment to a member of the applicant or a person directly related to a member of the applicant including a payment for technical or professional services
- Any payment to an LCBO employee or LCBO supplier

## **Eligibility Criteria**



LCBO reserves the right to determine, in its sole discretion, the eligibility of any project or applicant. The following criteria must be met for funding:

- Project execution must employ best practices in science-based conservation
- The project must be carried out in the province of Ontario.
- The applicant must be a not-for-profit organization.
- The applicant must partner or leverage grant funds with in-kind donations or other grants.
- The applicant must have a strong demonstrated volunteer component to their organization and to the specific project. (Note: Opportunities for LCBO employees and suppliers to become involved as volunteers in the project are desirable, but are not mandatory.)
- The applicant must have all applicable permits and approvals from agencies and governments that are required to undertake the project. Letters of approval/consent must be attached to the application.

## **Project Assessment**

Applications will be assessed using the following criteria:

- Demonstration of best practices
- Includes a volunteer component with engagement of local volunteer stewards
- Ability of applicant to complete project as described
- Fiscally responsible budget
- Level of community support, including matched funding, leveraging, partnership funds or in-kind contribution (includes all non-cash enabling resources, such as time, equipment, tools, supplies and services that contribute to the implementation, completion and monitoring of the project), level of engagement of broader community beyond government or agency.

## **Application Process**

Please fill in the attached application and send it to:

LCBO Natural Heritage Fund  
c/o Department 818  
55 Lake Shore Blvd. East  
Toronto, Ontario, M5E 1A4  
Email: [michelle.savoie@lcbo.com](mailto:michelle.savoie@lcbo.com)

If the LCBO accepts an application for funding, the applicant must abide by the terms and conditions that are set out in the NHF application form.

Please ensure that your application is complete and that two group members with signing authority of the applicant organization sign and date the application (attached). All pertinent project information, including budget, must be contained and submitted within the NHF application form. Complete all fields, if not applicable please indicate. Incomplete applications may be rejected. Upon completion please email an electronic copy and mail one signed complete application package to the above address. Transmission dates/postmarks will be noted. Each application will be technically reviewed and assessed by the LCBO's Project Selection Committee. Please keep a copy of the signed application and retain for your records.



The deadline for submitting an application to receive funding in any year is December 31 of the previous calendar year. The LCBO will notify successful applicants who will receive funding in any year by March 31 of that year.

## LCBO's Natural Heritage Fund Application Form

Please save as a new document. Type your responses and do not exceed the word count. Answer every question or explain how it does not apply.

### Part A-General Information

#### **About Your Organization:**

1. Name of Organization:  
Name of Contact Person:  
Full Address:  
Telephone:  
Fax:  
E-Mail:  
Website:
2. Please tell us about your organization. What is its mandate/purpose/vision? When was it established? Describe the community it serves/represents. (max 100 words)
3. Describe your organizations past experience planning and carrying out community based environmental initiatives. (Max 200 words)

#### **About Your Project:**

4. Project Name:  
Project Location:  
Start Date:  
End Date:
5. Project Description. What is the need or opportunity, area of focus & goals and objectives? (max 300 words)
6. Please describe your partners, their role and any expertise they offer. (max 100 words)
7. Please identify and describe any controversial issues associated with this project. (max 50 words)
8. How will you measure the effectiveness of the project and quantify its success? (max 100 words)

#### **Community Involvement and Outreach:**

9. What type of volunteer opportunities will your project create? Describe planned activities. (max 50 words)

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10. How will you promote the project to attract volunteers? Describe your outreach plan. (max 50 words)

11. How will you ensure that the project is maintained and cared for over the long term? Who will be responsible for any on-going care of the project? (max 100 words)

## Permits & Approvals:

12. Identify any approvals that your project requires and the steps you have taken to obtain them. Attach all approvals and indicate any that are pending. (Max 100 words)

## Part B-Budget

13. Dollar Amount Requested?

14. Amount from other Sources (cash and in-kind):

15. Total project value:

Please use the following charts to fill in your budget. Add lines as necessary.

Material, Supplies & Equipment	Costs			Funding Sources		
	Item	# of Units	Unit Cost	Total Cost	NHF	Cash
<i>e.g. native plant seedlings</i>	500	\$1	\$500	\$250	\$250	
<b>Sub-Total</b>						

## Other Funding Sources Minimum ratio of 1:1

Please list all cash contributions and in-kind support from other funding sources, including **ALL government sources**. In-kind support can include, for example, donations of equipment, materials, office space, volunteer time and professional services.

*Please note that you will need to provide confirmation letters from these funding sources. Any letters of confirmation not available at the time you submit your application can be sent in later; however, no funds can be released until all confirmation letters are received. The letters must indicate the cash or fair market value of the contribution being made.*

Group Name	Description	Cash	Value of In-Kind	Letter Included
e.g. ABC Nursery	Cash donation	\$250		Yes
e.g. ABC Community	Printing services		\$300	No





the truth, authenticity and accuracy of the information in deciding to provide financial assistance to the Applicant.

3. In no event will the LCBO be responsible for any direct, or indirect, or consequential damages sustained by the Applicant, howsoever caused.
4. The Applicant will use the proceeds of the Grant exclusively for Eligible Project Expenditures and for no other purposes. The Applicant shall pay to the LCBO on demand any portion of the Grant that is not used to pay for Eligible Project Expenditures. **"Eligible Project Expenditures"** are expenditures that meet the following criteria: (i) they are described in the Budget section of this application; (ii) they are incurred within one year after the date on which the Applicant receives the Grant; and (iii) they are not incurred for any of the following:
  - Salary or mandatory employee costs
  - Scholarships, grants or bursaries
  - Administrative or capital costs
  - Consultants
  - Exclusive private land stewardship initiatives
  - Lobbying or advocacy activities
  - Projects geared towards cosmetic enhancements only
  - Activities required by law or mandated by government
  - Fundraising initiatives
  - Personal or group expeditions or recreation
  - Mileage or meal costs
  - Members or persons directly related to a member of the proponent group are not eligible for any funding for any service including technical or professional services
5. The LCBO is not responsible to pay the Applicant any amount in excess of the Grant if the Grant is insufficient to cover the purpose of the Grant or the Applicant's eligible expenses.
6. The Applicant shall acknowledge the LCBO's support for the Project in all of its advertising and promotional material of whatever nature or kind.
7. The Applicant shall comply with all applicable laws, regulations and orders and duly observe all requirements of governmental authorities, and all statutes and regulations that could affect the performance of this agreement and the Project.
8. The Applicant shall implement and carry out the Project substantially in accordance with the Project Description and Project Budget described in this application.
9. The Applicant shall not use the Grant for any purpose other than for the purpose described in this application. The LCBO retains the right to cancel the Grant if the Applicant uses the Grant for any other purpose, in which case the Applicant shall refund the Grant to the LCBO on demand
10. The LCBO shall not be liable for any injury or damage (including death) to the person or property of any officer, or employee or agent of the Applicant, or for any claim, demand, action or cause of action by any third party arising out of or in any way related to the Project or the operations of the Applicant, or in any way related to this agreement, and

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the Applicant shall indemnify and save the LCBO harmless therefrom. The Applicant shall maintain in force for the duration of the Project all necessary insurance that would be considered appropriate for a prudent person undertaking a project similar to this Project including comprehensive general liability insurance subject to limits of not less than \$2,000,000.00 inclusive per occurrence.

11. The Applicant shall keep and maintain all records, invoices and other documents relating to the Grant funds in a manner consistent with generally accepted accounting principles and administrative practices, and shall maintain such records and keep them available for review by the LCBO and its agents during the Term and for a period of seven (7) years thereafter. The Applicant authorizes the LCBO and its agents, upon forty-eight (48) hours' notice or such other time as agreed upon by the parties and during normal business hours, to visit the Applicant's premises to review the progress of the Project and to inspect and copy any records, invoices and documents in the possession or under the control of the Applicant relating to the Project and the Grant funds. The LCBO's right of inspection includes the right to perform a full or partial audit. The Applicant shall provide any other information to the LCBO reasonably requested by the LCBO.
12. The Applicant shall submit a final Project report to the LCBO, in a form and substance satisfactory to the LCBO, summarizing the successes of the Project within one year after receiving the Grant.
13. The Applicant shall ensure that the Project is carried out without a conflict of interest by any person associated with the Project. A conflict of interest includes a situation in which a person associated with the Project or any member of his or her family is able to benefit financially from his or her involvement in the Project. The Applicant shall disclose to the LCBO without delay any actual or potential situation that may be reasonably interpreted as either a conflict of interest or a potential conflict of interest.
14. Nothing in this Agreement shall be construed as creating a partnership, joint venture, or agency relationship between the Applicant and the LCBO