



Acquisitions Paper & Tables

Information to prepare a case for support.

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Introduction

The package provides instructions and examples for TLC staff who are intended to bring forward acquisitions projects for approval at the staff level.

For each acquisition, staff are expected to draft an “Acquisitions Paper” an outline of which is provided on page 2. Informing this paper are the “Acquisitions Tables” which allow the author the opportunity to examine all aspects of the potential acquisition, from the values of the property to the potential costs and budget. Completion of the Acquisitions Tables is important, but the Acquisitions Tables cannot stand alone without the completion of the Acquisitions Paper.

The Acquisitions Paper is intended to state the case for the acquisition of the property. It is expected to highlight the best and most positive features of the property, while addressing any perceived negative aspects or problems. An example of a completed Paper is included at the back of this package.

Acquisitions Paper Outline

1. Introduction and Summary
 - Introduction – what is the proposed project
 - Options – what are the options to acquire and manage the property
 - Costs – what will it cost
 - Funding – how will we pay for it
 - Strategy – why is it a TLC priority
2. Background
 - History – what do we know about the property and its relationship to TLC
 - Landscape – how does the property fit into the larger landscape, including existing holdings
3. Description
 - Location – where is the property
 - Property Overview – what does the property look like
 - Buildings – are there buildings on the site, what is their condition
4. Merit (some sections may not fit all properties, the goal is to highlight the best features of the property, from Tables 1 and 2)
 - Values – what are the ecological or cultural values (from Table 1)
 - Landscape – how does the property benefit the larger landscape
 - Rarity – is the property unique in BC or in the region
 - Access – will there be visitors to the property and how will they be accommodated – Optional
 - Community Support – is there strong community support for the project – Optional
 - Interpretation – are there educational opportunities for the property - Optional
 - Strategy – does the property fit into a TLC strategy or a partnership strategy
5. Threats
 - Current threats – what are the current risks to the property
 - TLC's role – why is TLC the best owner for the property
6. Alternatives
 - Needs – what are the needs of the current landowner
 - Options – what options may be available to protect the property
7. Management
 - Short term – what are the short term needs for the property
 - Long term – what will need to occur to maintain the property in the long term
 - Partners – who can partner to assist with the management of the property
8. Finance
 - Value of the Property
 - Cost of the Purchase

Managements Costs – what are the estimated annual management costs, are there immediate management costs
Budget

9. Conclusion and Recommendations

What is the opportunity

How does it meet TLC objectives

What are the immediate needs after the acquisition is complete

What is the future management vision

What are the sources of funds

10. Acquisitions Table

11. Map – map of the property and of the larger landscape (if appropriate)

12. Budget



Table for Consideration of Acquisition Cover Sheet

Property: _____

Region: _____

| | | | |
|--|--|---|--|
| Primary value to TLC: (check one only) | <input type="checkbox"/> Ecological <input type="checkbox"/> Scientific | <input type="checkbox"/> Scenic <input type="checkbox"/> Agricultural <input type="checkbox"/> Recreational | <input type="checkbox"/> Cultural <input type="checkbox"/> Historic |
| Secondary value to TLC: | <input type="checkbox"/> Ecological <input type="checkbox"/> Scientific | <input type="checkbox"/> Scenic <input type="checkbox"/> Agricultural <input type="checkbox"/> Recreational | <input type="checkbox"/> Cultural <input type="checkbox"/> Historic |

Complete these questions after the acquisitions tables.

1. Is TLC the most appropriate owner?

2. What will happen if TLC does NOT acquire?

3. What is the overall assessment, based on these tables?

4. Is the acquisition covered by a Regional Strategic Plan or other strategic document?

5. What is the grade given to the property in question?

6. Can TLC involvement make a real difference?

7. Will the local community want, appreciate and support this place?

Regional Manager's Approval

Executive Director's Approval



Property: _____

Region: _____

| Table 1 - Natural and Cultural Heritage | | | | | | | | | | | | | | | | | | | | | |
|---|---|--|--------------------|---|--------------------|---------------------|---|--|-----------------------------|---|--|---------------------|--------------------|---------------------|--------------------|-----------------------|---------------|-------------|---|--|--|
| 1A. Ecological | | | 1B. Scientific | | | 1C. Scenic | | | 1D. Working Landscapes | | | 1E. Recreational | | 1F. Cultural | | 1G. Historic | | | | | |
| Critical Ecosystem | | | Scientific Value | | | Community Character | | | Land Capability | | | Compatibility | | Integrity | | Historical Provenance | | | | | |
| Critical | A | | Outstanding | A | | Outstanding | A | | High | A | | Highly Compatible | A | | Outstanding | A | | Outstanding | A | | |
| Significant | B | | Important | B | | Important | B | | Moderate | B | | Mostly Compatible | B | | Important | B | | Important | B | | |
| Important | C | | Interesting | C | | Interesting | C | | Low | C | | Somewhat Compatible | C | | Interesting | C | | Interesting | C | | |
| | | | Minor | D | | Minor | D | | | | | Not Compatible | D | | Minor | D | | Minor | D | | |
| Biodiversity | | | | | | | | | Size | | | | | | | | | | | | |
| High | A | | Research Potential | | | Integrity | | | Large | A | | Community Need | | Character | | Integrity | | | | | |
| Moderate | B | | Outstanding | A | | Outstanding | A | | Medium | B | | Outstanding | A | | Outstanding | A | | Outstanding | A | | |
| Low | C | | Important | B | | Important | B | | Small | C | | Important | B | | Important | B | | Important | B | | |
| | | | Interesting | C | | Interesting | C | | | | | Interesting | C | | Interesting | C | | Interesting | C | | |
| | | | Minor | D | | Minor | D | | Productivity | | | Minor | D | | Minor | D | | Minor | D | | |
| Critical | A | | | | | | | | High | A | | | | | | | | | | | |
| Significant | B | | Overall Assessment | | | Scope | | | Moderate | B | | Scope | | Cultural Provenance | | Scope | | | | | |
| Minor | C | | Outstanding | A | | Provincial | A | | Low | C | | Provincial | A | | Outstanding | A | | Provincial | A | | |
| | | | Important | B | | Regional | B | | | | | Regional | B | | Important | B | | Regional | B | | |
| | | | Interesting | C | | Local | C | | Integration of Other Values | | | Local | C | | Interesting | C | | Local | C | | |
| Red/COSEWIC | A | | Minor | D | | | | | Outstanding | A | | | | | Minor | D | | | | | |
| Blue | B | | | | | Overall Assessment | | | Important | B | | Overall Assessment | | | | | | | | | |
| None | C | | | | | Outstanding | A | | Interesting | C | | Outstanding | A | | Understanding | | Understanding | | | | |
| | | | | | | Important | B | | Minor | D | | Important | B | | Significant | A | | Significant | A | | |
| | | | | | | Interesting | C | | | | | Interesting | C | | Important | B | | Important | B | | |
| | | | | | | Minor | D | | Overall Assessment | | | Minor | D | | Interesting | C | | Interesting | C | | |
| | | | | | | | | | Outstanding | A | | | | | | | | | | | |
| | | | | | | | | | Important | B | | | | | | | | | | | |
| | | | | | | | | | Interesting | C | | | | | | | | | | | |
| | | | | | | | | | Minor | D | | | | | | | | | | | |
| Functional Condition | | | | | | | | | | | | | | | | | | | | | |
| Intact | A | | | | | | | | | | | | | | | | | | | | |
| Limited Restorator | B | | | | | | | | | | | | | | | | | | | | |
| Extensive Restorator | C | | | | | | | | | | | | | | | | | | | | |
| Overall Assessment | | | | | | | | | | | | | | | | | | | | | |
| Outstanding | A | | | | | | | | | | | | | | | | | | | | |
| Important | B | | | | | | | | | | | | | | | | | | | | |
| Interesting | C | | | | | | | | | | | | | | | | | | | | |
| Minor | D | | | | | | | | | | | | | | | | | | | | |
| | | | Overall Assessment | | Overall Assessment | | | | | | | | Overall Assessment | | Overall Assessment | | | | | | |
| | | | Outstanding | A | | Outstanding | A | | | | | Outstanding | A | | Outstanding | A | | | | | |
| | | | Important | B | | Important | B | | | | | Important | B | | Important | B | | | | | |
| | | | Interesting | C | | Interesting | C | | | | | Interesting | C | | Interesting | C | | | | | |
| | | | Minor | D | | Minor | D | | | | | Minor | D | | Minor | D | | | | | |



Property: _____

Region: _____

| Table 2 | | | |
|-------------------------------------|---|--|---|
| Benefit to BC | | | |
| Contribution to Conservation | | Community Support | |
| Exceptional | A | Supportive | A |
| High | B | Neutral | B |
| Moderate | C | Opposed | C |
| Low | D | | |
| Rarity in BC | | | |
| Rarity in BC | | Social and Educational | |
| Unique in BC | A | Great Potential | A |
| Rare | B | Significant | B |
| Unusual | C | Useful | C |
| Limited | D | Little Potential | D |
| Rarity in Region | | | |
| Rarity in Region | | Partnership | |
| Unique in Region | A | Identified Priority (joint venture) | A |
| Rare | B | Regional | B |
| Unusual | C | Potential | C |
| Limited | D | None | D |
| Threat | | | |
| Threat | | Access | |
| Destruction | A | Estimated visitors/year | |
| Damage | B | | |
| Erosion | C | Overall Assessment (deal with this in the report) | |
| Minor | D | | |

| Table 3 | | | |
|------------------------------------|---|---|---|
| Difficulty of protection | | | |
| Proximity to Existing Lands | | Inherent Problems | |
| New | 0 | Serious | 0 |
| Regional Strategy | 2 | Significant | 1 |
| Linked | 4 | Known/Limited | 2 |
| Infilling | 6 | None | 3 |
| Management Experience | | | |
| Management Experience | | Cost/Benefit | |
| None | 0 | High Cost/Low Benefit | 0 |
| Little Experience | 1 | High Cost/High Benefit | 1 |
| Experience in TLC | 2 | Low Cost/Low Benefit | 2 |
| Extensive | 3 | Low Cost/High Benefit | 3 |
| Management Consequences | | | |
| Management Consequences | | Funding | |
| Significant | 0 | Less than 50% of funding is identified | 0 |
| Substantial | 3 | 50-75% | 1 |
| Reorganization | 6 | More than 75% | 2 |
| | | 100% identified | 3 |
| Cost | | | |
| | | Estimated Purchase Price | |
| | | | |
| | | Overall Assessment % (total divided by 24) | |
| | | | |

Notes On The Acquisition Tables

COVER PAGE

The cover page for the acquisition tables is to be completed following the completion of the acquisitions table. All parts of Table 1 (sections 1A-1G) should be completed for each property, regardless of the low rankings that may occur for some properties. This exercise will inform the completion of the Statement of Significance for each property in the Management Planning process. The Cover Sheet, Tables 1, 2, and 3 and the Budget Sheet **must** be submitted as part of the Acquisitions Paper.

Approvals

All acquisitions must be approved by both the Regional Manager, the Executive Director and the Management Committee before going to the Board of Directors. All covenants must be approved by the Regional Manager, the Executive Director and Management Committee only.

Seven crucial questions

More detailed answers to these questions must be given in the Acquisitions Paper:

Question 1 seeks reassurance that there is not a more appropriate owner than TLC. We must consider ourselves an owner of last resort, especially in considering acquisitions outside our normal areas of activity.

Question 2 tries to put the advantages of TLC ownership into context by gaining a very clear idea of the consequences of the acquisition being turned down.

Question 3 depends upon the balance of the answers to the overall assessments arrived at for each scale. For instance an acquisition which scored "C" on tables 1 and 2, and (say) 11 on the difficulty scale, might well proceed subject to finance. On the other hand a similar score on Tables 1 and 2 combined with 2 or 3 on the difficulty scale might well provide food for thought. This balance is best dealt with in the narrative of the Acquisition paper in a clearly written conclusion.

Question 4 - although there will always be properties that are not easily identified by even the best strategic document, as TLC develops and refines planning documents for all regions, properties that are identified within these documents will be easier to define to the Management Committee.

Question 5 - the use of the broader National Trust grading system allows Managers to place potential projects in context against each other and to determine the importance of each on a provincial scale. See page 29.

Question 6- the answer to the 6th question allows the consideration of TLC's vision for the property as well as the capacity and ability to manage the property effectively. Although similar to question 1, question 6 also relates to the state of the property.

Question 7 speaks to the desire of the community to support the project and speaks to TLC's desire to meet community needs. If the answer to this question is 'no' serious thought must be given to TLC's willingness to be involved in the project and the repercussions to TLC's reputation in the local community.

TABLE 1 – NATURE AND CULTURAL HERITAGE

This table is intended to help to identify the inherent merit of a property. The fact that a particular property may not have all the elements indicated is not important and the words 'not applicable' should be entered if that is the case. This will not affect the acquisition decision. It is not necessary to consult advisers or other experts regarding all the categorisations made, but it is certainly wise to obtain authoritative support if you wish to categorise any heading at "A". Resources to assist in decision making have been included for some sections. These resources can be found in T:\TLC PROJECTS\Acquisition Process.

Because TLC is a provincial organization, all criteria are based on a provincial scale. It is understood that criteria that are viewed as nationally or internationally significant would also be considered to be provincially significant.

Table 1 is divided into multiple parts, in order to best evaluate the diversity of properties that TLC deals with. Managers are asked to select primary values and secondary values and to complete the appropriate section of Table 1 for each.

Table 1A – Ecological Values

This category is intended to assess the ecological value of natural sites such as grasslands, wetlands, and forests.

Critical Ecosystem

This heading is intended to reflect the ecological values of a property within the larger context of its ecosystem.

- A rating: An ecosystem that is critically imperilled within BC, such as the Antelope Brush or Garry Oak ecosystem would be considered Critical.
- B rating: An ecosystem that is under less pressure or that is more common, but that is under-represented (less than 12% protection for BEC zone variant or ecoregion) under current provincial protection would be considered Significant.
- C rating: An ecosystem that is more common, but that is regionally significant, would be considered Important.
- Resources: Protected Area System BEC variants spreadsheet.

Biodiversity

This heading is intended to assess the quality of the habitat that for a suite of species.

- A rating: Properties with documented high species diversity/richness (more than 250 species) (based on 1:50,000 mapsheets).
- B rating: Properties with moderate species diversity (100-249 species).
- C rating: Properties with low species diversity (99 species or fewer).
- Resources: Species richness mapsheets.

Connectivity

This heading is intended to assess the ability of a property to provide functional habitat or to connect existing areas of habitat.

- A rating: Properties that are large enough to provide critical habitat for a given species or suite of species without additional protected areas (i.e., the property provides suitable habitat on its own), areas that provide a critical linkage between habitats, or areas that are in-holdings (e.g. within a protected area, or breeding site within habitat complex – difference between winter and spring range, breeding site and winter site, breeding site and foraging site) would be considered Critical.
- B rating: A smaller property that provides suitable habitat for a given species, but only in conjunction with other protected areas, or within a matrix of suitable non-protected lands would be considered Significant.
- C rating: Properties that represent isolated patches of suitable habitat.

Species-At-Risk

This heading is intended to determine the ability of the property to provide habitat for listed species-at-risk. This list should also include endemic species, even if those species are not listed.

- A rating: Properties that contain provincially red-listed species, COSEWIC species, or endemic species.

- B rating: Properties with provincially blue-listed species.
C rating: Properties with no endemic species or species-at-risk.
Resources: BC Species Explorer <http://srmapps.gov.bc.ca/apps/eswp/>

When ranking this category, consideration should be given to the habitat elements that support the species in question such as wildlife trees, hibernacula, foraging areas, etc. This category should be more than a list of observed species.

Functional Condition

This heading is intended to assess the condition of the habitat that is provided by the property.

- A rating: Properties that are intact and that do not need active restoration or enhancement.
B rating: Properties that require limited amounts of difficult restoration (eg stream rehabilitation) or that require lengthy amounts of simple restoration (eg. noxious weed control).
C rating: Properties that require an extensive amount of difficult restoration.

Overall Ranking

The overall rating must not be arrived at simply on the basis of the numbers of "A", "B" and "C" ratings achieved. A judgement will have to be made about the relative importance of the headings themselves in the context of the property being acquired. It is quite possible that the sum of the ratings given may be greater than the parts.

Only in very rare cases can the overall merit be "A". By implication such a rating implies that the acquisition is so important in terms of merit that the other considerations should be downgraded, or even set aside.

Example properties for overall Ecological rankings:

- A rating: Fort Shepherd Conservancy Area (Kootenay Region)
B rating: Horsefly River Riparian Conservation Area (North Region)
C rating: Wildwood (VI Region)
D rating Hardy Mountain Doukhobour Museum (Okanagan Region)

Table 1B – Scientific Values

This category is intended to assess natural sites with values that are primarily scientific in nature such as fossil sites and sites with endemic species.

Scientific Value

This heading is intended to assess the contribution of a property to British Columbia's scientific knowledge.

- A rating: Properties that contain unique (one of a kind) scientific values or values that are important at a provincial scale (or greater).
- B rating: Properties that are more common or that are regionally important.
- C rating: Properties that are interesting but that are either quite common or that are locally important.
- D rating: Properties of lesser importance.

It is expected that properties that are presented with a C or D rating would have primary values present in other categories.

Research Potential

The scientific value of a property is augmented by the ability of that property to contribute to scientific research.

- A rating: Properties that have active research projects ongoing.
- B rating: Properties with proposed research projects or where public access to the site has been limited in the past.
- C rating: Properties that are included in landscape level research projects.
- D rating: Properties with limited research potential.

Overall Ranking

The overall rating must not be arrived at simply on the basis of the numbers of "A", "B" and "C" ratings achieved. A judgement will have to be made about the relative importance of the headings themselves in the context of the property being acquired. It is quite possible that the sum of the ratings given may be greater than the parts.

Only in very rare cases can the overall merit be "A". By implication such a rating implies that the acquisition is so important in terms of merit that the other considerations should be downgraded, or even set aside.

Example properties for overall Scientific rankings:

- A rating: Burgess Shale (Yoho National Park)
- B rating: Wildwood (VI Region)
- C rating: Sooke Potholes (VI Region)

1C – Scenic Values

This category is intended to assess properties that are valued by British Columbians for their outstanding beauty or uniqueness, either natural or cultural. Potential sites would include viewscapes, landmarks, geological features (caves, waterfalls, etc), and properties that define the urban character of an area.

Community Character

This is intended to determine the scenic value of the property to the local community and to determine how that scenic asset influences the character of the community. It is expected that sites that rank highly in this category will be actively promoted within the local community.

- A rating: The loss of the subject property would result in an irrevocable change to the character of the community.
- B rating: Properties are important to the character of the community, but their loss would not irrevocably damage the community.
- C rating: Properties are interesting in the overall context of the community, but the community contains other similar sites that contribute to the character of the community.
- D rating: Properties are of minor interest to the community.

Integrity

Sites that are intact are assumed to be of higher merit than sites that are compromised, unless the site is of such unique and critical importance that condition is irrelevant.

- A rating: The site must be 90% intact or be of outstanding uniqueness in the community.
- B rating: The site should be 75% intact.
- C rating: Sites that are 50% intact.
- D rating: Sites that are less than 50% intact.

Scope

This category is intended to determine whether the scenic resource is important at a provincial, regional or local level.

- A rating: A site that is well-known to all British Columbians.
- B rating: A site that is important regionally.
- C rating: A site that is important to the local community.

Overall Ranking

The overall rating must not be arrived at simply on the basis of the numbers of "A", "B" and "C" ratings achieved. A judgement will have to be made about the relative importance of the headings themselves in the context of the property being acquired. It is quite possible that the sum of the ratings given may be greater than the parts.

Only in very rare cases can the overall merit be "A". By implication such a rating implies that the acquisition is so important in terms of merit that the other considerations should be downgraded, or even set aside.

Example properties for overall Scenic rankings:

A rating: Inner Harbour (Victoria)
B rating: Sooke Potholes (VI Region)
C rating: Horsefly River Riparian Conservation Area (North Region)
D rating: Wildwood (VI Region)

1D – Working Landscapes

This category is intended to evaluate sites that have value as working landscapes. These are sites that may not have high ecological or cultural values, but are important because of their contribution to the ways people work on and interact with the landscape. Sites that would be included in this category are agricultural sites and ecoforestry sites.

Land Capability

This category is intended to assess the soil and climate capability of the property for agriculture or the land capability for forestry.

A rating: Properties with an overall capability of 1, 2, or 3. In addition, in areas where the overall capability is low, properties with capabilities that are regionally high may also score here.

B rating: Properties with an overall capability of 4 or 5.

C rating: Properties with an overall capability of 6 or 7.

Resources: British Columbia Soil Surveys

<http://sis.agr.gc.ca/cansis/publications/bc/index.html>

Size

This category acknowledges the fact that larger working landscapes are more likely to be sustainable over the long term and that larger properties have a wider potential for different land management possibilities.

A rating: Agricultural properties with an overall size that is >10% than the average farm size of that type in their region, forestry sites greater than 500 acres.

B rating: Agricultural properties with an overall size that is within 10% of the average farm size of that type in their region, forestry sites between 250-500 acres

C rating: Agricultural properties with an overall size that is <10% than the average farm size of that type in their region, forestry sites smaller than 250 acres

Resources: BC Agriculture, Average Farm Sizes spreadsheet

Productivity

This category is intended to assess the ability of the property to meet the criteria of a “working” landscape. However, it should be recognized that properties may sacrifice economic productivity in favour of ecological or social productivity. Properties that strive to find a balance between economic, social, and ecological productivity should rank highly here.

A rating: Management of property is self-sustaining, ecological and/or social values are not compromised. Little or no investment either of time or resources is required for property to become self-sustaining. (Note: in this circumstance, time can refer either to and investment of labour or the need to wait before production can begin).

B rating: Management of property requires a one-time investment to become self-sustaining, time or resources are needed to recover ecological or social values.

C rating: Management of property cannot become self-sustaining, ecological or social values are compromised or missing.

Integration of Other Values

Because working landscapes have values beyond just agriculture or forestry, it is important to create strong links between the other categories of values on this table.

A rating: The property in question must receive an overall assessment of an A in one of the other categories in this table.

B rating: The property receives a B rating in one or more of the other categories.

C rating: The property receives a C rating in one or more of the other categories.

Note: Overall A ratings are intended to be difficult to achieve in all categories, for an agricultural property to not score an A rating should not be seen as lessening the value of the property, rather it should be seen as a fair assessment of the values on the property.

Overall Ranking

The overall rating must not be arrived at simply on the basis of the numbers of "A", "B" and "C" ratings achieved. A judgement will have to be made about the relative importance of the headings themselves in the context of the property being acquired. It is quite possible that the sum of the ratings given may be greater than the parts.

Only in very rare cases can the overall merit be "A". By implication such a rating implies that the acquisition is so important in terms of merit that the other considerations should be downgraded, or even set aside.

Example properties for overall Working Landscape rankings (Examples will be added at a later date)):

A rating:

B rating:

C rating:

D rating:

1E – Recreational Values

This category is intended to evaluate sites that are of recreational value to British Columbians and that are compatible with TLC's other values. Sites that would be included in this category are trails, climbing sites, kayaking routes, caving sites and camping areas.

Compatibility

TLC's mandate gives support to projects that have recreational values that are compatible with the other values TLC aims to conserve. This includes non-motorized activities such as hiking, biking, kayaking, camping, swimming, climbing, and cross-country skiing.

- A rating: Properties where the recreational values are highly compatible with TLC aims, where current or increasing use will not have a negative impact and where infrastructure exists to support that use.
- B rating: Properties where the activity is considered compatible, but where either the use will have a negative impact or the infrastructure is not fully in place.
- C rating: Properties where the recreation use is not fully compatible with TLC's aims or where the expected use will have a detrimental impact or where new infrastructure would need to be created.
- D rating: Properties where the recreational use is considered inappropriate.

Community Need

Recreational properties must also meet the needs of the community. A trail system that no one uses has little value to the community or to TLC's overall goals. This category is intended to determine whether or not the property meets a recreational need for the community and if the property will be used as a recreational resource by the community.

- A rating: A property that is both valued and used by the local community. Properties that are used extensively by local recreational clubs or properties that draw large numbers of individual users would fall into this category.
- B rating: Properties are important to the community, but may not receive a high level of use or may be one of a series of similar sites present within the community.
- C rating: Properties receive some use, but are part of a larger spectrum of sites within the community.
- D rating: Properties have limited recreational value and use by the community.

Scope

This category is intended to determine whether the recreational resource is important at a provincial, regional or local level.

- A rating: A site that is well-known to all British Columbians (such as the Squamish Chief).
- B rating: A site that is important regionally.
- C rating: A site that is important to the local community.

Overall Ranking

The overall rating must not be arrived at simply on the basis of the numbers of "A", "B" and "C" ratings achieved. A judgement will have to be made about the relative importance of the headings themselves in the context of the property being acquired. It is quite possible that the sum of the ratings given may be greater than the parts.

Only in very rare cases can the overall merit be "A". By implication such a rating implies that the acquisition is so important in terms of merit that the other considerations should be downgraded, or even set aside.

Example properties for overall Recreational rankings:

- A rating: Skaha Bluffs (Okanagan Region)
- B rating: Sooke Potholes (VI Region)
- C rating: Horsefly River Riparian Conservation Area (North Region)
- D rating: Wildwood (VI Region)

1F – Cultural Values

This category is intended to assess values of those sites that have outstanding cultural value to British Columbians. Sites that would be included in this category are gardens, monuments, sacred or spiritual places, cultural landscapes, sites with architectural value, and sites that are significant for specific cultural groups within BC. In addition, First Nations sites and archaeological sites will fall into this category.

Integrity

Sites that are intact are of higher merit than sites that are compromised, unless the site is of such unique and critical importance that condition is irrelevant.

- A rating: Sites must retain integrity of location, setting, feeling, and association and in the case of built sites, also of design, materials and workmanship.
- B rating: Sites will be compromised in one or more of the above categories, but will still retain the majority of their integrity.
- C rating: Sites will have lost integrity in more than half of the above categories.

Character

Properties that receive an A rating will embody the distinctive characteristics that define that type of site. Factors to consider when determining the character of the site include the type, period, artistic merit, or method of construction of the site. It is recognized that First Nation's, sacred spaces, and archaeological sites may be difficult to evaluate under this category.

- A rating: Sites possess unique characteristics that are not evident at other sites, characteristics that exemplify excellence over like sites in British Columbia or sites that possess a unique combination of characteristics.
- B rating: Sites will possess characteristics of a lesser quality or of a more common nature.
- C rating: Sites will be interesting in nature, but will either be of poor quality or will be commonly found within British Columbia.

Cultural Provenance

While there is overlap between cultural and historical provenance, care must be taken to discriminate between them.

- A rating: Sites with outstanding cultural provenance are those sites that are definitive for the culture in question (the Hardy Mountain Doukhobour Village is a good example).
- B rating: Properties that are representative of a snapshot of a culture's experience in British Columbia, but that may not tell the entire story of that culture.
- C rating: Sites that are interesting, but that are less representative or are of lesser importance.

Understanding

This category is intended to evaluate the ability of cultural properties to contribute to our current or future understanding of the identity and history of cultural groups .

- A rating: Sites that will greatly expand our cultural knowledge.
- B rating: Sites that will expand our knowledge, but that are similar to other related sites.
- C rating: Sites that are interesting, but that are commonplace.

Overall Ranking

The overall rating must not be arrived at simply on the basis of the numbers of "A", "B" and "C" ratings achieved. A judgement will have to be made about the relative importance of the headings themselves in the context of the property being acquired. It is quite possible that the sum of the ratings given may be greater than the parts.

Only in very rare cases can the overall merit be "A". By implication such a rating implies that the acquisition is so important in terms of merit that the other considerations should be downgraded, or even set aside.

Example properties for overall Cultural rankings:

- A rating: Hardy Mountain Doukhobour Museum (Okanagan Region)
- B rating: Ross Bay Villa (VI Region)
- C rating:
- D rating: Horsefly River Riparian Conservation Area (North Region)

1G – Historic Values

This category is intended to evaluate those sites that have tangible and intangible historical value to British Columbians. Sites evaluated under this category are expected to be post-contact in nature (First Nations sites will be evaluated under the Cultural Values section. Sites in this category include built heritage, sites associated with historic people or events, shipwrecks, and cemeteries.

Historical Provenance

This heading is intended to reflect the association of the property within the history of British Columbia.

- A rating: Properties that are associated with historically important figures, events or other factors that shaped BC's history. Also, properties that are representative of a certain time period would fit into this rating.
- B rating: Properties associated with lesser historical figures or events or those properties that are significant in a regional context.
- C rating: Properties where the provenance is more general in nature.
- D rating: Properties where the provenance is unclear or missing.

Integrity

Sites that are intact are assumed to be of higher merit than sites that are compromised, unless the site is of such unique and critical importance that condition is irrelevant.

- A rating: Sites must retain integrity of location, setting, feeling, and association and in the case of built sites, also of design, materials and workmanship.
- B rating: Sites will be compromised in one or more of the above categories, but will still retain the majority of their integrity.
- C rating: Sites will have lost integrity in more than half of the above categories.

Scope

This category is intended to determine whether the historical resource is important at a provincial, regional or local level.

- A rating: A site that is well-known to a vast majority British Columbians.
- B rating: A site that is important regionally.
- C rating: A site that is important to the local community.

Understanding

This category is intended to evaluate the ability of cultural properties to contribute to our current or future understanding of the identity and history of cultural groups.

- A rating: Sites that will greatly expand our historic knowledge.
- B rating: Sites that will expand our knowledge, but that are similar to other related sites.
- C rating: Sites that are interesting, but that are commonplace.

Overall Ranking

The overall rating must not be arrived at simply on the basis of the numbers of "A", "B" and "C" ratings achieved. A judgement will have to be made about the relative importance of the headings themselves in the context of the property being acquired. It is quite possible that the sum of the ratings given may be greater than the parts.

Only in very rare cases can the overall merit be "A". By implication such a rating implies that the acquisition is so important in terms of merit that the other considerations should be downgraded, or even set aside.

Example properties for overall Historic rankings:

- A rating: Hardy Mountain Doukhobour Museum (Okanagan Region)
- B rating: Keating Farm (VI Region)
- C rating:
- D rating: Horsefly River Riparian Conservation Area (North Region)

TABLE 2 - BENEFIT TO BC

This table seeks to assess the benefit to BC which will arise from the acquisition.

Contribution to Conservation

This heading acknowledges the need of TLC to deliver on the question of real and meaningful conservation of our properties.

- A rating: For properties to rank as exceptional, the property must either be integrated into an existing protected areas framework, be identified by an appropriate government body or other authority (eg. BC Heritage Branch), be identified in a pre-established conservation priority setting exercise (including internal TLC exercises), or be of sufficient size to buffer adjacent land use practices.
- B rating: Properties that are not large enough to buffer adjacent land use without protecting additional areas or properties that were overlooked from ranking exercises (as listed above) but are considered important.
- C rating: Properties that fall outside of identified priority areas or that are not large enough to act as buffer areas and where no opportunities exist to create larger buffers.
- D rating: Properties that do not meet any of the above criteria would rank as low.

Rarity in BC

This heading seeks to determine whether a property is worth protecting. This is not the same as its inherent merit nor the magnitude of the threat it faces; rather it is an attempt to measure the rarity of the property.

- A rating: The property must be unique in the province - not the locality. Fewer than 5 similar sites (both in terms of values and condition) exist in BC.
- B rating: The property is less unique, but still rare. Between 6-10 similar sites exist in BC.
- C rating: The property is more common, with more than 10 similar sites in BC.

It is perfectly legitimate to take into account the "tangible and intangible feel" of a place and its authenticity in arriving at an "A" or "B" rating. If you seek to do this, however, it is as well to have the support of members of a Regional Committee or the Management Committee.

Rarity in the Region

This heading acknowledges both TLC's desire to meet the needs of the community and the fact that different regions give different levels of priority to similar sites. For example, quality grazing lands may be more common in most of the province, but would be considered exceedingly rare in the Lower Mainland.

- A rating: Properties must be unique in the region (regardless of their status in the province). Fewer than 5 similar sites (both in terms of values and condition) exist in the region.
- B rating: The property is less unique, but still rare. Between 6-10 similar sites exist in the region.
- C rating: The property is more common, with more than 10 similar sites in BC.

Threat

While not all properties are purchased on the basis of threat, this remains an important assessment, especially when considering two similar properties.

- A rating: The property must face literal destruction to qualify for this rating, damage alone is not enough.
- B rating: Scoring "B" means that there is a real prospect of serious damage to the property if it is not owned by TLC.
- C rating: Erosion is a more subtle concept. The acquisition of a property by a private owner or organisation with good intentions but inadequate resources qualifies here.
- D rating: There are circumstances where there is no real threat at all and we should be prepared to admit this.

Partnership

Because TLC works in partnership wherever possible, assessing the potential for partnership on a particular project is valuable.

- A rating: Properties that are supported by a larger partnership group, such as a Joint Venture or the SOSCP or EKCP or properties that have been identified as priorities by the relevant government department.
- B rating: Properties supported by local or regional partnerships would receive a B rating.
- C rating: Properties that are not supported by existing partnerships, but where partnerships could be created.

Community Support

This heading is expected to assess the feelings of the local community regarding the project.

- A rating: The property has been identified by the local community (local government, local interest groups, groups of local citizens, both formal and informal).
- B rating: Properties where the community is without a significant opinion of the acquisition.
- C rating: Properties where the community is opposed to the acquisition. In this case, the opposition of the local community should be addressed in the Acquisitions report.

Social and Education

These values are closely linked. The purpose of this element is to indicate the extent to which the nature of the property can contribute towards the sum of human knowledge and provide a meaningful impact or improve the quality of life of visitors to the site. Ownership of the site contributes to social good – by benefiting a social, cultural, or identified group, by providing meaningful congregant space for a community, or by contributing to a learning experience.

- A rating: The property is easily accessible and can be used for formal education programs and/or has an active research component.
- B rating: The property creates an important hub for informal education programs and has the potential for a research component.
- C rating: The property is inaccessible and education and/or research components are impractical.

Access

This is a very specific element - although it is accepted that informed guesses will often have to be made. The narrative should include a pro-forma estimate of attendance to the site over a three to five year start up period. It is important to articulate assumptions about operations at the site at this point, especially if challenges restrict public access. If a property is not open to the public but will be accessible, on however restricted a basis when owned by TLC, that should be addressed in the narrative report.

Table 2 - Overall Benefit to BC

Unlike the table for Natural and Cultural Heritage, the headings are set out in order of importance. The simple act of protection (for example for a sensitive nature reserve) may be so important that it outweighs low ratings under all the other headings. The overall assessment for this table should be contained in the narrative because the individual criteria are different in themselves. For example there are properties under little or no threat. If this is the case it is hard to see how acquisition could be justified whatever the other benefits might be.

It is not an accident that TLC refers to "benefit" and do not define this purely in terms of access. There may be significant benefit to the mere protection of a property.

TABLE 3 - DIFFICULTY OF PROTECTION

This table is rather different from the previous two which were concerned with the nature of the property itself. The table tries to measure the difficulty of permanently preserving and sustaining the property to an acceptable standard in the context of the general management of TLC. It is deliberately mathematical: the lower the score, the more difficult the acquisition.

Proximity to Existing Lands

TLC has identified a list of potential acquisitions throughout the province. However, we recognize that this list is by no means complete and that changes may occur. It should also be recognized that many projects may be considered “New” and yet still fit into a larger strategy held by TLC. If an acquisition is unconnected with any of our existing properties and is not part of an approved strategy, it must be included at the highest level of difficulty. Some properties may be located adjacent protected areas held by government or other conservation organizations. Consideration should be given to those circumstances in this rating.

- 0 rating: Property is a “new” acquisition and is not connected to existing protected lands (including lands owned by other agencies). For heritage properties, take into account the distance of this property from other similar TLC properties and the resources that can or can’t be shared between the properties.
- 2 rating: Property is not connected to other protected properties but is identified as a priority in the region’s planning documents.
- 4 rating: Property is linked to existing properties and is in close proximity to them.
- 6 rating: Property is infilling in an existing protected area. For heritage and cultural properties, this would include property that completes an existing acquisition (eg the Abkhazi extension).

It will be apparent that some acquisitions which score "A" or "B" ratings elsewhere, will also be outside our strategies and that many unforeseeable complications may, therefore, arise. We must face up to this fact.

Management Experience

This element is based on the experience TLC has in managing the type of property concerned.

- 0 rating: There is no experience in managing these types of properties or there is no capacity to manage them properly.
- 1 rating: There is a little experience in managing these types of properties, but not in the region or the capacity isn’t adequate to manage them.
- 2 rating: There is significant experience in managing these properties within TLC, but not necessarily within the region or there may not be the capacity to look after the acquisition.
- 3 rating: There is extensive experience in managing these properties in the region. and the people likely to be involved with the acquisition must have the time and resources to look after it.

Consequences

All acquisitions have some management consequences. This heading tries to indicate how large these are likely to be.

- 0 rating: The Region will require additional resources (staff, funding, etc) to deal with the management of the property.
- 3 rating: The region will need to reorganize its existing resources in order to manage the property.
- 6 rating: The consequences are limited to the property itself with little additional burden being felt at regional level.

Inherent Problems

While not all problems with acquisitions can be anticipated, some situations can be identified based on our past experience.

- 0 rating: The management of the property may be encumbered by a lease or other legal agreement that is known to be problematic. An acquisition may lead to the need to make other acquisitions to protect it; in this situation the rating must be 0. Management or restoration issues have been identified that are known to be difficult to deal with.
- 1 rating: The management of the property may be encumbered by a lease or other legal agreement that may be problematic. Management or restoration issues have been identified that could be difficult to deal with.
- 2 rating: Management or restoration issues are limited or strategies are in place to address them.
- 3 rating: No inherent problems have been identified.

If a collection or artefacts is involved which is not owned by TLC, this fact needs to be fully reflected under this heading.

Cost/Benefit

A simple understanding of the price of a property is often not enough to determine the overall benefit of its acquisition. This heading seeks to weigh the tangible and intangible costs and benefits against each other. It is not enough to simply weigh the purchase price of the property in making this determination.

- 0 rating: Property has a high cost, including above or equivalent to Fair Market Value price, high immediate management or restoration costs, continuing long-term management needs or restoration costs and/or negative consequences to the community AND these negative factors are not compensated for by the relative value of the property or the need for urgent protection.
- 1 rating: Property has a high cost, including above or equivalent to Fair Market Value price, high immediate management or restoration costs, continuing long-term management needs or restoration costs and/or negative consequences to the community BUT these negative factors are compensated for by the relative value of the property or the need for urgent protection.
- 2 rating: Property has a low cost, including below Fair Market Value price, low immediate management or restoration costs, no continuing long-term management needs or restoration costs and/or positive consequences to the community BUT these positive factors are not enhanced by the relative value of the property or the need for urgent protection.
- 3 rating: Property has a low cost, including below Fair Market Value price, low immediate management or restoration costs, no continuing long-term

management needs or restoration costs and/or positive consequences to the community AND these positive factors are enhanced by the relative value of the property or the need for urgent protection.

Funding

To acknowledge that the availability of funding to purchase properties is often a problematic factor with any acquisition, this criterion has been added as a partial means of assessment for the acquisition. For conservation covenants and donated lands, where funding is required for management rather than purchase, this factor should also be utilized. For acquisitions, management funds should be included with the purchase price. This rating should also reflect any endowments or possible revenue sources for the property, such as cottage rentals.

- 0 rating: Properties where less than 50% of the funding has been identified or secured.
- 1 rating: Properties where 50-75% of the funding is identified or secured.
- 2 rating: Properties where more than 75% of the funding is identified or secured.
- 3 rating: Properties where 100% of the funded has been identified or secured.

Cost

This item has been included from an informational stand point, to allow the quick assimilation of the overall cost (purchase price and management) of the acquisition to be known.

Table 3 – Overall Difficulty of Preservation

This is a calculation of percent difficulty (points achieved divided by a maximum score of 24). A low score will not prevent an acquisition taking place, but it will imply a need for substantial financial resources and this should be taken into account. The implications considered in this section should be fleshed out in the budget section as well as the acquisitions paper.

Property Grading System

Below describes the grading system for all potential acquisitions or conservation covenants by TLC. This grading system shall be used consistently across the province in an effort to maintain a professional approach to land conservation. Rankings generated using this system should be used to answer Question 5 on the Acquisitions Tables Cover Sheet.

1 Provincial or National Importance

Ecological, historical, and/or cultural interest acknowledged to be of the highest order unquestionably fulfilling the TLC's criteria for acquisition as directed by our bylaws.

2 Regional/Local Importance

Ecological, historical, and/or cultural interest of importance, but less exceptional. This grade may be supported by regional designations defined by local authorities or other agencies – or by the region itself.

3 Additional and Logistical Importance

Areas probably only worth considering for acquisition for reasons such as buffer land around existing property, land capable of restoration or land for the improvement of management or access or other facilities or to assist the viability of existing property.

X Unsuitable for Protection by TLC

The primary grades above are qualified where appropriate by applying a further a, b, c rating to take account of other factors:-

- a) Very important and urgent e.g. for strategic reasons or high and imminent risk of development or other threats. This category will be likely to include the conversion of covenants into ownership in most cases.
- b) Important but not urgent e.g. because of secure and protective existing ownership – or for other reasons.
- c) Important, but for secondary reasons, such as management or protection of property already owned. Such land might be held alienably in the shorter term.



**Fort Shepherd Flats
Acquisition Support Paper**

March 31, 2006

Prepared by: Kathleen Sheppard, Kootenay Region Manager



Acquisitions Paper Cover Page

Significance: The Fort Shepherd Flats property contains the following values:

- the only contiguous intact area of the ICHxw biogeoclimatic zone in British Columbia
- a number of species-at-risk
- Class 1 and 2 winter range for Mule Deer
- the historic location of Fort Shepherd

Background: Efforts from within the local community to secure this property have been ongoing for at least 20 years. The Fort Shepherd Flats property has been considered a priority for acquisition by the Columbia Basin Fish and Wildlife Compensation Program for a number of years. TLC became involved in discussions about the property in 2002, beginning with a series of informal meetings with Teck Cominco. TLC has always expressed a strong interest in this property, due to the ecological importance of the property and TLC's existing relationship with Teck Cominco.

Rationale: The following rationale is offered for the purchase of this property:

- the only contiguous intact area of the ICHxw biogeoclimatic zone in British Columbia
- the community of Trail has expressed strong support for this project
- a key holding in the Kootenay Region Ecological Strategy
- a provincially significant property and the most important acquisition in the West Kootenay.

Property Connections: The property is not adjacent to any existing conservation lands or protected areas, however, its size is large enough to allow it to stand alone and still protect the ecological values of the property.

Partnerships: The following partners have expressed an interest in participating in this project:

- Trail Wildlife Association
- Columbia Basin Fish and Wildlife Compensation Program
- Columbia Basin Trust

Funding Scenarios: It is expected that the majority of funds for this acquisition will be raised from foundations and granting agencies. A breakdown of potential funding sources can be found with the budget.

Price: Estimated between \$1.3-1.9 million

Timeline: Negotiation and lead up – 1-1.5 years; 4 year mortgage

Endowment Potential: An endowment will need to be raised for this property. A 15% premium will be added to all funding requests that will be applied to the endowment.



Fort Shepherd Flats, Acquisition Support Paper

1. Introduction and Summary

Introduction: This paper seeks input and support for the acquisition of Fort Shepherd Flats, a 2012 ac property located near Trail, BC. The property contains the only intact area of the ICHxw biogeoclimatic variant in BC and provides winter range for ungulates and habitat for species at risk.

Options: This property is a fee simple acquisition. Teck Cominco will hold a four year mortgage on the property.

Costs: Estimated cost (pending appraisal data from Teck Cominco) \$1.3-1.7 million

Funding: It is expected that the majority of funds for this acquisition will be raised from foundations and granting agencies. A breakdown of potential funding sources can be found with the budget.

Strategy: This property was identified as a priority in the Kootenay Region Ecological Strategy. Due to its size and the importance of its ecological features, it is a significant property on a provincial scale and is probably the most important acquisition in the West Kootenay area.

2. Background

History: Efforts from within the local community to secure this property have been ongoing for at least 20 years. The Fort Shepherd Flats property has been considered a priority for acquisition by the Columbia Basin Fish and Wildlife Compensation Program for a number of years. TLC became involved in discussions about the property in 2002, beginning with a series of informal meetings with Teck Cominco. TLC has always expressed a strong interest in this property, due to the ecological importance of the property and TLC's existing relationship with Teck Cominco.

Landscape: The Fort Shepherd Flats property is bordered by the Columbia River to the east, Teck Cominco and Crown land to the west, by the US border to the south and by Teck Cominco land to the north. It is not adjacent to any existing conservation lands or protected areas, however, its size is large enough to allow it to stand alone and still protect the ecological values of the property.

3. Description

Location: Fort Shepherd Flats is located south of the City of Trail and borders the Columbia River to the east and the US border to the south. The property is 2012 ac (964 ha) in size.

Property Overview: The property runs north south along the western shore of the Columbia River for 8.3 km. Immediately adjacent to the River, the property is predominately flat but it rises from 1400 feet to more than 3800 feet towards the western part of the property.

The property contains a combination of closed forest, shrubland and rocky outcrops combined with smaller areas of grassland and open forest. Sheppard Creek, a small but permanent stream flows east-west through the property and an unnamed creek flows roughly north-south into the United States. Peace Pond, a small pond is located near the edge of the Columbia River.

Although the property is zoned ALR, there is no historic agricultural use and the potential for agriculture is low.

Buildings: There are no buildings on the site, however, a cairn marks the location of the historic Fort Shepherd, a Hudson's Bay fort dating to 1856.

4. Merit

Values: The southern part of the property **contains the rare ICHxw biogeoclimatic variant** and this property is the only intact, contiguous area of any size that contains this variant. Less than 0.01% of this BEC variant is protected in BC. The acquisition of Fort Shepherd Flats will increase the total protected area of this BEC variant to 2.5%.

Due to the rarity of the ICHxw subzone in BC, the property also **contains a number of species-at-risk** including Great Blue Heron, Canyon Wren, Townsend's Big-eared Bats, and Racers. Other species are suspected, but not confirmed for the property. In addition, the property **contains Class 1 and 2 winter range for Mule Deer**.

Culturally, this property **contains the historic location of Fort Shepherd**, a Hudson's Bay fort dating from 1856-1872. Fort Shepherd was built to secure HBC interests in anticipation of the surveying of the 49th parallel. It is located on the Dewdney Trail and was an important stopping place during the Kootenay gold rush. However, its proximity to Fort Colville (which was better situated) soon made Fort Shepherd redundant. It was closed in 1870 and the empty fort buildings burned down in 1872. No remnants of the fort are visible today, however, a cairn erected in 1959 marks the location of the fort.

Rarity: This property contains **the only contiguous intact area of the ICHxw biogeoclimatic zone in British Columbia**. Other areas of ICHxw can be found near Creston, where the landscape is highly fragmented and directly to the east, on the other side of the Columbia River, where the only protected area, Beaver Creek Provincial Park for this BEC zone is located. However, at 44 ha, Beaver Creek Provincial Park is dwarfed by Fort Shepherd. Despite the presence of Beaver Creek Provincial Park, this area on the opposite side of the Columbia River is industrialized and fragmented.

Community Support: The **community of Trail has expressed strong support for this project**. The Trail Wildlife Association has been involved in seeking the protection of this property for more than 20 years and are eager to see TLC purchase this property. In addition, the Trail Wildlife Association has pledged assistance and support in the management of the property. The area is used by local hikers, horseback riders, orienteers, hunters and anglers.

Strategy: Fort Shepherd Flats has been identified as **a key holding in the Kootenay Region Ecological Strategy**. In addition, it has been identified by other partner organizations, including the Columbia Basin Fish and Wildlife Compensation Program and Columbia Basin Trust, as a top priority for acquisition. Due to the rarity of its features, it can be considered **the most important acquisition in the West Kootenay**.

5. Threats

Current threats: Fort Shepherd has often been considered for development, due to its strategic location near the US border. As recently as 2004, local developers were promoting the property for development as a north-south highway connector to Idaho. Other proposals for the site have included different types of industrial development (gravel pits, cement factories, etc). It is likely that were the property offered for sale on the open market that it would be developed for these or other purposes that would be ecologically damaging.

TLC's Role: TLC has been involved with Teck-Cominco since 1998 through negotiations over the Wycliffe Wildlife Corridor. Subsequently, TLC has been involved in discussions with Teck-Cominco about Fort Shepherd since 2002. The prominence of the Fort Shepherd Flats property will increase TLC's profile in Trail in particular and in the greater West Kootenay region as well. To date, conservation efforts in the West Kootenay by all land trusts have been scattered and the acquisition of this property will increase awareness of TLC.

6. Alternatives

Needs: Teck-Cominco holds these lands as surplus to their operations in the Trail area. Like the lands sold to TLC in the Kimberley area (Wycliffe Wildlife Corridor), Teck-Cominco wishes to recoup a financial benefit from the sale of these lands. However, they also recognize the importance of these lands to the local community and therefore they are willing to provide TLC with some flexibility in terms of the price and structure of the purchase.

Options: The parcels included in Fort Shepherd Flats are all either partially or entirely in the Agricultural Land Reserve, thus removing some of the options that might have otherwise been available to us. Teck Cominco is proposing to hold an interest-free, four year mortgage on the property with payments to occur annually.

7. Management

Short term: There are two management issues that would need to be dealt with immediately: off-road vehicles and noxious weeds. Restricting off-road vehicles is an immediate priority for the property and fortunately, it can be easily done by blocking access to the property in one strategic location where the installation of a gate between two natural, but significant rock outcroppings would solve the problem. Once the off-road vehicles are eliminated, noxious weeds (in particular, knapweed) can be controlled.

A noxious weed strategy will need to be developed for the property and control methods will need to be examined. Several sites have already been used for the release of biological control agents for knapweed.

Long term: Over the long term, TLC will need to continue to work with the Trail Wildlife Association who have been conducting habitat enhancement activities on the property for more than 20 years. A management plan will need to be drafted to identify and address long term management issues.

Challenges: The large size of the property presents certain challenges in terms of management. In addition, the distance of this property from TLC's regional office and the small number of staff in the region create other challenges.

Resources: A complete analysis of the management needs for this property has not been done. It is likely that key management costs will include noxious weed control and habitat enhancement.

Expertise: It is not anticipated that this property will have any unique management problems that have not already been addressed elsewhere in TLC.

Capacity: TLC will seek to gain a formal management arrangement with the Trail Wildlife Association as a means of reducing the immediate need for further staffing. The Kootenay Region Manager will explore possible sources of funding to support the position of Warden. No staff will be hired without available funding support.

Partners: The Trail Wildlife Association have volunteered to assist with the management of this property. Although the specific interest of this group is related to managing game species in the area, the group is locally connected to the property and have more than 20 years experience with the property. TLC will seek a management agreement with the Trail Wildlife Association.

8. Finance

Value of the Property: Estimated between \$1.3-\$1.7 million, based on 2000 appraisal.

Cost of the Purchase: Estimated at \$1.7-\$2.3 million, including costs and endowment.

Managements Costs: Immediate management costs include the construction of a steel gate to restrict off-road vehicle access, installation of an information sign to promote the property and noxious weed control. Detailed numbers are included in the budget.

Annual management costs are estimated at between \$2,000 and \$10,000. Voluntary support from the Trail Wildlife Association is expected to decrease these costs and funding may be sought from other sources for specific projects.

Long Term Revenue Potential: At this time, no long term sources of revenue have been identified. Fundraising efforts for the purchase of the property will include a 15% premium that will be applied to the endowment for the property. Ideally, the endowment will provide between \$7,800 and \$10,200 in revenue each year.

9. Conclusion and Recommendations

Fort Shepherd Flats rates a 1b on the criteria ranking scale due to the rarity of the BEC zone variant and the lack of protection for that variant within the province. The large size of the property creates a unique opportunity for TLC to develop a presence in the West Kootenay and in the Kootenay Region as a whole.

The acquisition of this property meets TLC's objectives to secure lands of high ecological importance. Fort Shepherd Flats is a provincially unique opportunity.

The management vision for this property will be to monitor and maintain the species at risk on the property and to maintain the ecosystem in as intact a state as possible. In addition, the

property will be managed in partnership with the Trail Wildlife Association to maintain and improve ungulate winter range.

The Management Committee is asked to recommend the Executive Committee and the Board:

To approve the acquisition of this property, pending the following conditions:

- Receipt of relevant environmental data regarding the condition of the property (especially soils data) from Teck Cominco
- Receipt of an acceptable appraisal from Teck Cominco
- Securement of at least 75% of the funding for this project by October 1, 2007.

To declare the property inalienable.

10. Map

X marks the location of Fort Shepherd. Please note, the property is solely on the west side of the Columbia River.

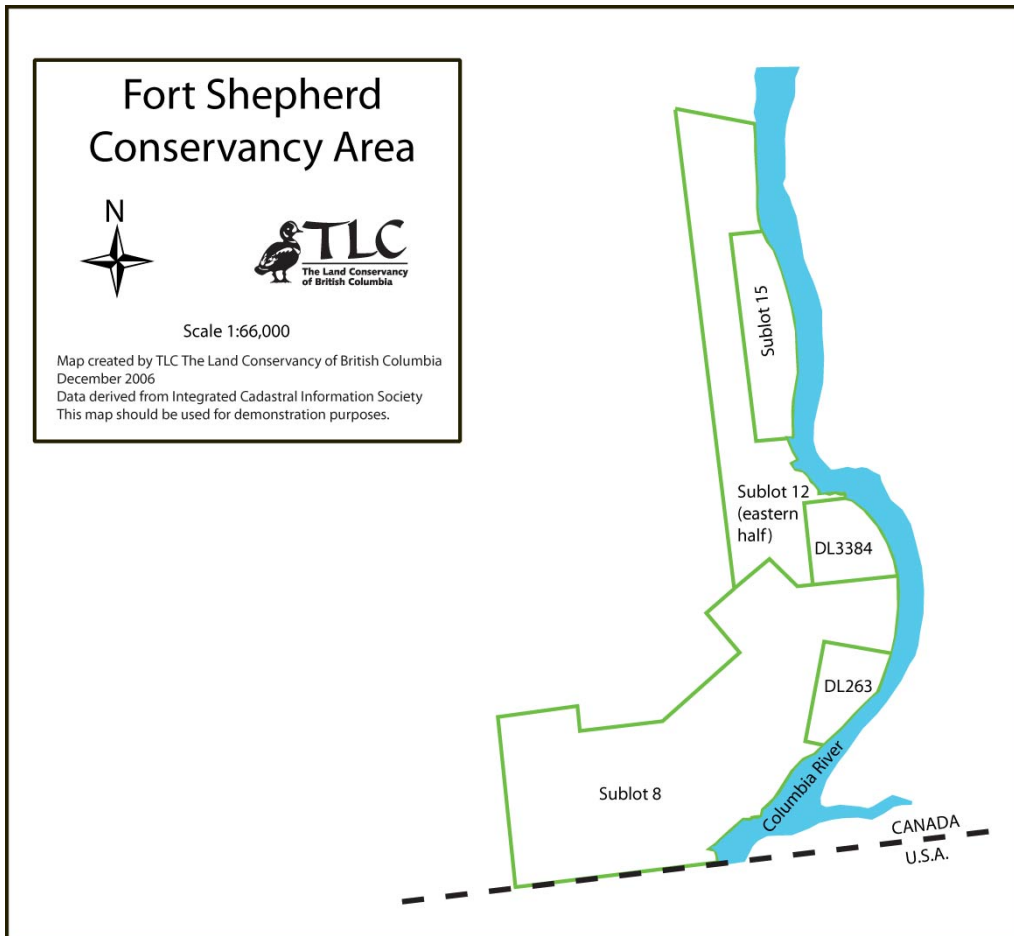




Table for Consideration of Acquisition

Property: Fort Shepherd

Region: Kootenay

| | | | |
|--|--|--|--|
| Primary value to TLC: (check one only) | <input checked="" type="checkbox"/> Ecological | <input type="checkbox"/> Scenic | <input type="checkbox"/> Cultural |
| | <input type="checkbox"/> Scientific | <input type="checkbox"/> Agricultural | <input type="checkbox"/> Historic |
| | | <input type="checkbox"/> Recreational | |
| Secondary value to TLC: | <input type="checkbox"/> Ecological | <input type="checkbox"/> Scenic | <input type="checkbox"/> Cultural |
| | <input checked="" type="checkbox"/> Scientific | <input type="checkbox"/> Agricultural | <input checked="" type="checkbox"/> Historic |
| | | <input checked="" type="checkbox"/> Recreational | |

Please complete the appropriate tables for the values listed above.

Complete these questions after the acquisitions tables.

| | |
|---|---|
| 1. Is TLC the most appropriate owner? | Yes |
| 2. What will happen if TLC does NOT acquire? | Continued erosion of habitat, possible large scale development |
| 3. What is the overall assessment, based on these tables? | A |
| 4. Is the acquisition covered by a Regional Strategic Plan or other strategic document? | Yes |
| 5. What is the grade given to the property in question? | 1a |
| 6. Can TLC involvement make a real difference? | Yes, better management and long term securement of critical habitat |
| 7. Will the local community want, appreciate and support this place? | Yes, very supportive |

Regional Manager's Approval

Executive Director's Approval



Property: Fort Shepherd

Region: Kootenay

| Table 1 - Natural and Cultural Heritage | | | | | | | | | | | | | | | | | | | | |
|---|---|---|--------------------|---|---|---------------------|---|---|-----------------------------|---|---|---------------------|---|---|---------------------|---|---|-----------------------|---|---|
| 1A. Ecological | | | 1B. Scientific | | | 1C. Scenic | | | 1D. Working Landscapes | | | 1E. Recreational | | | 1F. Cultural | | | 1G. Historic | | |
| Critical Ecosystem | | | Scientific Value | | | Community Character | | | Land Capability | | | Compatibility | | | Integrity | | | Historical Provenance | | |
| Critical | A | | Outstanding | A | A | Outstanding | A | A | High | A | | Highly Compatible | A | A | Outstanding | A | | Outstanding | A | |
| Significant | B | B | Important | B | | Important | B | | Moderate | B | B | Mostly Compatible | B | | Important | B | B | Important | B | B |
| Important | C | | Interesting | C | | Interesting | C | | Low | C | | Somewhat Compatible | C | | Interesting | C | | Interesting | C | |
| | | | Minor | D | | Minor | D | | | | | Not Compatible | D | | Minor | D | | Minor | D | |
| Biodiversity | | | | | | | | | Size | | | | | | | | | | | |
| High | A | A | Research Potential | | | Integrity | | | Large | A | A | Community Need | | | Character | | | Integrity | | |
| Moderate | B | | Outstanding | A | A | Outstanding | A | B | Medium | B | | Outstanding | A | A | Outstanding | A | | Outstanding | A | |
| Low | C | | Important | B | | Important | B | | Small | C | | Important | B | | Important | B | B | Important | B | |
| | | | Interesting | C | | Interesting | C | | | | | Interesting | C | | Interesting | C | | Interesting | C | C |
| Connectivity | | | Minor | D | | Minor | D | | Productivity | | | Minor | D | | Minor | D | | Minor | D | |
| Critical | A | A | | | | | | | High | A | | | | | | | | | | |
| Significant | B | | Overall Assessment | | | Scope | | | Moderate | B | | Scope | | | Cultural Provenance | | | Scope | | |
| Minor | C | | Outstanding | A | A | Provincial | A | | Low | C | C | Provincial | A | | Outstanding | A | | Provincial | A | |
| | | | Important | B | | Regional | B | B | | | | Regional | B | B | Important | B | C | Regional | B | B |
| Endangered Species | | | Interesting | C | | Local | C | | Integration of Other Values | | | Local | C | | Interesting | C | | Local | C | |
| Red/COSEWIC | A | A | Minor | D | | | | | Outstanding | A | A | | | | Minor | D | | | | |
| Blue | B | | | | | Overall Assessment | | | Important | B | | Overall Assessment | | | | | | | | |
| None | C | | | | | Outstanding | A | | Interesting | C | | Outstanding | A | | Understanding | | | Understanding | | |
| | | | Important | B | B | Important | B | B | Minor | D | | Important | B | B | Significant | A | | Significant | A | |
| | | | Interesting | C | | Interesting | C | | | | | Interesting | C | | Important | B | B | Important | B | B |
| | | | Minor | D | | Overall Assessment | | | Minor | D | | Minor | D | | Interesting | C | | Interesting | C | |
| | | | | | | Outstanding | A | | | | | | | | | | | | | |
| | | | | | | Important | B | | | | | | | | | | | | | |
| | | | | | | Interesting | C | | | | | | | | | | | | | |
| | | | | | | Minor | D | D | | | | | | | | | | | | |
| Functional Condition | | | | | | | | | Overall Assessment | | | | | | Overall Assessment | | | Overall Assessment | | |
| Intact | A | | | | | | | | Outstanding | A | | | | | Outstanding | A | | Outstanding | A | |
| Limited Restorator | B | B | | | | | | | Important | B | | | | | Important | B | B | Important | B | B |
| Extensive Restorator | C | | | | | | | | Interesting | C | | | | | Interesting | C | | Interesting | C | |
| | | | | | | | | | Minor | D | | | | | Minor | D | | Minor | D | |
| Overall Assessment | | | | | | | | | | | | Overall Assessment | | | Overall Assessment | | | Overall Assessment | | |
| Outstanding | A | A | | | | | | | | | | Outstanding | A | | Outstanding | A | | Outstanding | A | |
| Important | B | | | | | | | | | | | Important | B | B | Important | B | B | Important | B | B |
| Interesting | C | | | | | | | | | | | Interesting | C | | Interesting | C | | Interesting | C | |
| Minor | D | | | | | | | | | | | Minor | D | | Minor | D | | Minor | D | |



Property: Fort Shepherd

Region: Kootenay

| Table 2 | | | | | |
|------------------------------|---|---|---|---|---|
| Benefit to BC | | | | | |
| Contribution to Conservation | | | Community Support | | |
| Exceptional | A | A | Supportive | A | A |
| High | B | | Neutral | B | |
| Moderate | C | | Opposed | C | |
| Low | D | | | | |
| Rarity in BC | | | Social and Educational | | |
| Unique in BC | A | A | Great Potential | A | |
| Rare | B | | Significant | B | |
| Unusual | C | | Useful | C | C |
| Limited | D | | Little Potential | D | |
| Rarity in Region | | | Partnership | | |
| Unique in Region | A | A | Identified Priority (joint venture) | A | A |
| Rare | B | | Regional | B | |
| Unusual | C | | Potential | C | |
| Limited | D | | None | D | |
| Threat | | | Access | | |
| Destruction | A | | Estimated visitors/year | | |
| Damage | B | B | | | |
| Erosion | C | | Overall Assessment (deal with this in the report) | | |
| Minor | D | | | | |

| Table 3 | | | | | |
|------------------------------------|---|---|--|-------|---|
| Difficulty of protection | | | | | |
| Proximity to Existing Lands | | | Inherent Problems | | |
| New | 0 | | Serious | 0 | |
| Regional Strategy | 2 | 2 | Significant | 1 | |
| Linked | 4 | | Known/Limited | 2 | 2 |
| Infilling | 6 | | None | 3 | |
| Management Experience | | | Cost/Benefit | | |
| None | 0 | | High Cost/Low Benefit | 0 | |
| Little Experience | 1 | | High Cost/High Benefit | 1 | |
| Experience in TLC | 2 | 2 | Low Cost/Low Benefit | 2 | |
| Extensive | 3 | | Low Cost/High Benefit | 3 | 3 |
| Management Consequences | | | Funding | | |
| Significant | 0 | | Less than 50% of funding is identified | 0 | |
| Substantial | 3 | 3 | 50-75% | 1 | |
| Reorganization | 6 | | More than 75% | 2 | |
| | | | 100% identified | 3 | 3 |
| Cost | | | | | |
| Estimated Purchase Price | | | | | |
| Overall Assessment (max 24, min 0) | | | | 62.5% | |



Acquisition Budget

Property: Fort Shepherd

Region: Kootenay

| | | | | Notes |
|---|--|---------------------|--------------------|------------------------------|
| Value of the property (appraised): | | \$1.5 Million | | |
| Acquisition Cost | | | | |
| | Income | Expenditure | Totals | Notes |
| Asking Price | | 500,000 | | \$1 million Ecogift |
| Additional Area | | | | |
| Subtotal | | | \$500,000 | |
| Capital Costs | | | | |
| | Income | Expenditure | Totals | Notes |
| Signage | | \$ 5,000.00 | | |
| Improvements | | | | |
| Display materials | | \$ 250.00 | | |
| Interpretation | | | | |
| Surveying | | | | |
| Appraisal | | | | Cominco to pay for |
| Gates/fences | | \$ 5,000.00 | | |
| Restoration | | \$ 10,000.00 | | |
| Paths/trails | | | | |
| Legal fees | | \$ 5,000.00 | | |
| Other (please list) | | | | |
| Subtotal | | | \$20,250 | |
| Endowment Costs | | | | |
| | Income | Expenditure | Totals | Notes |
| Endowment required | | \$ 500,000.00 | | |
| Subtotal | | | \$ 500,000 | \$400,000 donated by Cominco |
| Total Capital Requirement | | | \$1,020,250 | |
| Annual Operating Budget | | | | |
| | Income | Expenditure | Totals | Notes |
| Leases/Rentals | | | | |
| Endowment Income | \$20,000 | | | |
| TLC Enterprises | | | | |
| Other (please list) | Grant money | \$ 10,000 | | |
| Subtotal | | | | |
| Monitoring | | \$ 2,000.00 | | |
| Staff Time | | \$ 10,000.00 | | |
| Annual Maintenance | | \$ 8,000.00 | | |
| Other (please list) | Property Taxes | \$ 2,500.00 | | |
| Subtotal | | \$ 20,000.00 | | |
| Plus 20% Contingency | | \$ 4,000.00 | | |
| Total Annual Operating Budget | \$ 30,000 | \$ 26,500.00 | | |
| Income over Expenses | | | \$ 3,500.00 | |
| Sources of Revenue - Acquisition | | | | |
| | Source | | | Amount |
| | Columbia Basin Trust | | | \$ 100,000.00 |
| | Fish and Wildlife Compensation Program | | | \$ 100,000.00 |
| | HCTF | | | \$ 100,000.00 |
| | Trust for Public Lands | | | \$ 200,000.00 |
| | | | | |
| | | | | |
| | Total: | | | \$ 500,000.00 |