



BAILLIE FUND APPLICATION GUIDELINES

Program Goals and Objectives

The James L. Baillie Memorial Fund for Bird Research and Preservation (the Baillie Fund) is a project of Birds Canada, a charitable organization and Canada's national non-governmental body for bird conservation.

The Baillie Fund provides grants to individuals, groups and organizations for projects that further Birds Canada's mission:

To advance the understanding, appreciation, and conservation of wild birds and their habitats, in Canada and elsewhere, through studies and programs that engage the skills, enthusiasm and support of its members, volunteers, staff and the public.

In particular, the Baillie Fund supports projects that address one or more of the following goals:

- Contribute to our **understanding** of birds in their natural environment;
- Increase Canadians' **appreciation** of wild birds and their habitats; and/or
- Advance the **conservation** of Canadian birds.

General objectives of the Baillie Fund are to:

- Encourage field studies by amateur naturalists;
- Encourage projects that involve volunteer naturalists in field work;
- Encourage projects that use information gathered by volunteer Citizen Scientists (e.g., Birds Canada's long-term monitoring programs and the North American Breeding Bird Survey) to further bird conservation;
- Support projects that disseminate knowledge about Canadian birds;
- Support projects that use the public appeal of birds and the enthusiasm of amateur naturalists to engage the public and promote Birds Canada's mission; and
- Provide seed funding (for up to three years) to launch long-term projects that are expected to become self-supporting or develop other sources of sustainable funding. Atlas-type projects are an exception, and may be funded for their duration.

Eligible Projects

The Baillie Fund supports research, monitoring, education and conservation projects that involve any wild bird species occurring in Canada.

Please note that for eligible multi-year projects, applicants should submit a new proposal each year.

Eligible projects include:

- Inventory and atlas-type projects that provide information on the distribution and abundance of Canadian birds at various scales;
- Monitoring projects that provide information on changes in bird populations or other ecological factors, including evaluation of results;
- Pilot migration monitoring projects (new locations, or new programs at established stations);
- Research projects that involve studies of birds in their natural environment;
- Bird conservation science and education projects;
- Projects that improve public awareness of the needs of Canadian birds;
- Projects that provide training in field methods to volunteers and interns;
- Projects that promote the conservation of bird species identified as a priority for conservation provincially, nationally or internationally; and
- Projects that promote the conservation of Important Bird Areas in Canada.

The following are generally considered to be of low funding priority:

- Publication costs;
- Birding festivals;
- Habitat enhancement or restoration;
- Established migration monitoring programs and other ongoing projects;
- Bird rehabilitation projects; and
- Construction of artificial nest structures, nest boxes and viewing platforms.

Ineligible projects include:

- Studies that entail the sacrificing of study subjects; and
- Land acquisition projects.

Geographic Scope

Projects must be conducted in Canada, or on Canadian breeding birds on their wintering grounds or along their migratory pathways.

Who can apply?

Individuals, non-profit organizations and organizations without charitable status, but that run non-profit programs may submit applications. For collaborative projects with partners from First Nations, Inuit and Métis communities, it is preferred that the Indigenous partner submits the application. For atlas-type projects, applications must be submitted by the

sponsoring organization or project coordinator, rather than by individual participants or regional coordinators. Support of graduate student research is not a priority for the Baillie Fund, unless the research clearly involves substantial numbers of volunteers in data collection or in other aspects of the project.

Eligible Costs

Baillie Fund support may be used to cover various project costs, including those associated with promoting volunteer involvement, compiling and analysing data collected by volunteers, reasonable field expenses and travel costs, and field equipment and supplies. Please note, however, that overhead expenses (e.g., university overhead, or payroll and accounting fees) and refreshments and giveaways at events (e.g., birding blitz or workshop) are not eligible.

The following guidelines have been established regarding eligible salary, travel and living expenses. Please note that for projects conducted in northern, remote (i.e., at least 250 km or four hours drive from the home base) or isolated (i.e., lacking road access) areas, travel, food and accommodation combined can account for 100% of the amount requested, but the need for this must be clearly justified.

Salary Expenses:

- Salaries may be requested only for Regular Grants and typically only when a strong volunteer component is included in the project;
- Normally, salaries should account for no more than 25% of the grant request (this includes contracts for services, such as website design and the development of smartphone applications). However, requests to develop smartphone applications for use in northern communities are considered differently and, in such cases, the entire application could be to cover such costs;
- Salaries may be paid only when there is a demonstrated need (e.g., for volunteer coordinators, data analysts, or experienced banders);
- Salaries may not be requested for individuals who are already being paid as part of their duties by a sponsoring agency;
- Salaries requested must have a minimum 75% matching component that does not include in-kind calculations for volunteer services (i.e., another funding source must be paying for the balance of the salary requested); and
- Graduate students are not eligible for salary costs if the data collected will, or may be, used as part of their degree program.

Travel Expenses:

- The most economical means of travel must be chosen – any deviation from this must be justified;
- Normally, travel expenses should account for no more than 25% of the grant request. However, requests to travel by aircraft or boat to isolated study sites are considered differently and, in such cases, the entire application could be to cover travel costs;
- Compensation for road travel is based on the rate of 45 cents/km; and

- Applicants are not eligible for travel expenses if they are already employed and travel expenses for the project are covered by the employer.

Living Expenses:

- Expenses for accommodation and food may be claimed when the volunteer is at least 250 km or four hours drive from their home base. For projects that are closer, compensation may be considered if justified (e.g., the research site is isolated and is reached by aircraft or boat);
- Living expenses should account for no more than 25% of the grant request; and
- Per diem claims for food and lodging shall not exceed \$35.00/day per person.

Granting Programs

The James L. Baillie Fund has three granting programs:

- The Regular Grants Program;
- The Small Grants Program; and
- The Student Award for Field Research.

The application and review process is different for each grant program. Please read the following, decide which grant program fits your project, and follow the application process for that program. (Please note that a given project can only be submitted to one program.) All eligible Regular or Small Grant proposals will be evaluated by the Baillie Fund Committee, using the following criteria:

- Does the project, as described, advance the goals and objectives of the Baillie Fund;
- Is the project pertinent and of high quality;
- Is the project volunteer-based and, if so, how many volunteers are involved;
- Is the proponent sufficiently qualified to undertake the project;
- Are the methods sufficiently described for Trustees to determine whether the project is well planned (e.g., are protocols clear, concise and complete; is volunteer training sufficient; are permits and/or property access required and, if so, have they been obtained; and is project publicity adequate);
- Is the proposal well written;
- Is the budget realistic, and are there matching funds or partnering organizations; and
- Is the project likely to be successfully completed?

A small amount of external money is provided each year to support a Regular or Small Grant project that includes banding or other means of marking and tracking Canadian birds. The funds are intended primarily, though not exclusively, for capture and marking equipment, and preference will be given to studies involving the marking of birds in Canada.

Decisions concerning grants are announced by March and cheques for successful projects are issued in late May or early June. For Regular and Small grant projects conducted outside the usual May to December funding and reporting cycle, applications can be submitted in the year preceding the planned activity. However, the funds provided must be used in the

year for which they were requested and reporting should be completed within three months of the completion of the project.

Regular Grants

The Regular Grant program provides grants of between \$1,000 and \$5,000 to non-profit organizations or organizations without charitable status, but that run non-profit programs. Regular Grants may not contribute more than 50% of the total cost of a project (i.e., the amount requested must have at least a 1:1 cash or in-kind contribution match and a 3:1 cash match for any salary requested).

A minimum of \$15,000 is available annually under the Regular Grants program, and normally between six and eight grants are awarded each year.

The Regular Grant application deadline is **December 15**. Applications must follow the prescribed format and be no longer than 10 pages in 12-point type. **Only** applications submitted electronically (in .PDF, .RTF or .Microsoft Word format) will be accepted.

Small Grants

The Small Grants program provides grants of between \$250 and \$1,000 to individuals, non-profit organizations or organizations that do not have charitable status, but that run non-profit programs, for volunteer-based projects. Salary costs are ineligible. No matching cash or in-kind contributions are required.

A maximum of \$5,000 is available annually under the Small Grants program, and normally between three and six Small Grants are awarded each year.

The Small Grant application deadline is **January 15**. Applications should follow the recommended format and be no longer than six pages. Applications should be submitted electronically (in PDF, RTF or Microsoft Word format).

Student Award for Field Research

Although support of undergraduate, graduate, or post-doctoral studies is not a priority of the Baillie Fund, it does support one award, The James L. Baillie Student Research Award, which is awarded to a graduate student conducting field studies on Canadian birds in their natural environment. The \$2,000 award is administered by The Society of Canadian Ornithologists on behalf of Birds Canada, and the application deadline is **February 15**.

Information on how to apply for The James L. Baillie Student Award for Field Research is available on the Society of Canadian Ornithologists website at <https://www.sco-soc.ca/student-awards>.

Summary of Baillie Fund Granting Programs

	Regular Grants	Small Grants	Student Research Award
Eligibility	Non-profit organizations	Individuals or organizations	Graduate students
Matching Funds Required	At least 1:1 match required, 3:1 for salary	None required	None Required
Size of Grants	\$1,000 to \$5,000	\$250 to \$1,000	\$2,000
Total Amount Available Annually	Minimum of \$15,000	Up to \$5,000	\$2,000
Number of Grants Awarded Annually	Six to eight	Three to six	One
Average percentage of projects funded	45%	36%	4%
Call for Proposals	October	October	October
Application Deadline	December 15	January 15	February 15
Grants Announced	March	March	March

For additional information on the various grant programs please contact the Baillie Fund Secretary by e-mail at acoughlan@birdscanada.org.

Updated: September 2020