Strategic Conservation Planning
For Land Trusts in Hard Times

2012 Massachusetts Land Conservation Conference

Ole M. Amundsen III, The Conservation Fund
With special Guest
Reggie Hall, The Conservation Fund

Kevin Case, Peer Reviewer
Chris Fichtel, Peer Reviewer
Carol Mayes, Peer Reviewer
Sara Wilson, Peer Reviewer
Connecting Planning and Fundraising

"Gentlemen we have run out of money: now we have to think.

Winston Churchill"
Strategic Conservation Planning

A process that produces tools to aid decision makers in identifying, prioritizing, pursuing, and protecting those specific tracts of land that will most effectively and efficiently achieve the land trust's mission.

Available From Land Trust Alliance Publications website
2010 Land Trust Census

Land Trusts that have plans protected twice as much land as land trusts without plans.

<table>
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<th>GEOGRAPHY</th>
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Plans Connect You to Individuals

Individuals account for the majority of US Chartable giving.

Source: Giving USA 2010
The Planning Process

- Step 1: Getting Started
- Step 2: Understanding your Community
- Step 3: Setting Priorities
- Step 4: Implementation
Step 1. Getting Started

☐ Prerequisites
  • Commitment of decision makers (board/staff)
  • Existing land trust policies: mission statement, service area, and project selection criteria
  • A willingness to use maps (hard copy or GIS)

☐ Set Expectations & Establish Goals

☐ Determine Leadership and Participation

☐ Develop a “To Do List” or Work Plan
Time, Funding and Help

- May take between 12 to 18 months to complete
  - Step 1. Getting Started (2 to 4 months)
  - Step 2. Understanding Your Community (4 to 5 months)
  - Step 3. Setting Priorities (4 to 5 months)
  - Step 4. Implementation (2 to 4 months)
- May require funding – can range from $1,000 to tens of thousands of dollars.
Hard Times – Funding Your Plan

– Consider local universities’ student workshops: Umass Amherst, Clark, Harvard GSD, MIT DUSP, Tuffs and many others!

– Community foundations

– National Park Service Rails and Trails Technical Assistance program – free technical help

– Work with partners – town conservation commissions, open space committees, regional planning authorities, other land trusts
Set Expectations & Establish Goals

- What are the key questions that the plan seeks to answer?
- What are the important Land Trust policies, principles and values that must be reflected or reaffirmed in the plan?
- What are the mandates that the plan must fulfill?
- What is the anticipated final product of the planning process?
Public Involvement

- Create a list of who is the public for the land trust:
  - Landowners
  - Land Trust Members
  - Your ideas here!

- The role of the public will depend on:
  - the purpose of your strategic conservation planning effort
  - the local culture and attitudes towards planning in your region

- Create a list of potential roles that the public may play:
  - Review of draft plans or mapping information
  - Completing surveys on the use of current land trust lands or polling folks on their conservation resource preferences
  - Circling potential areas as candidate regions for focus areas
  - Your ideas here!
Step 2.
Understanding Your Community

- Identify and Gather Information
  - Inspirational Information
  - Technical & Reference Information
  - Mapping Information
  - Resource Inventories

- Analyze Information
  - Explore Local History and Demographics Trends
  - Create a Map of Conserved Land
  - Use Resource Inventories
  - Assess Threats to Resources
Fundraising is all about Understanding Your Community

- Research to develop “you story” of your community and “why” conservation is important.
- Develop the history of the land trust as part research on the community
- Provides information for case statements for funding.
- By examining demographics, real estate markets in a down turn – you identify high quality opportunities – lands, landowners.
Inspirational Information

MY FIRST SUMMER IN THE SIERRA
J. MUIR

WALDEN; OR, LIFE IN THE WOODS.
By Henry D. Thoreau

JAMES FENIMORE COOPER
THE LAST OF THE MOHICANS
Technical Information

Statewide Planning Studies
- Coastal Estuarine Land Conservation Plans
- State Wildlife Action Plan
- Forest Action Plan
- Statewide Comprehensive Outdoor Rec. Plan
- BioMap

Regional and Local Plans
- Watershed Plans and EPA 319 Plans
- Scenic Byway Corridor Studies
- County and Municipal water quality and supply studies
- Local Comprehensive Plans or Open Space Plans
- Your Ideas Here!
Assessing Resource Threats

- Scale of threat: global, regional or local?
- How long will the threat take to mature?
- Are all of the factors composing the threat within the control of the land trust?
- Which is a higher priority for your land trust – the conservation resources and lands directly under threat now or lands that will not be threatened for some time?
Step 3.
Setting Priorities

- Select Appropriate Methods of Land Prioritization
- Project Selection Criteria
- Focus Areas
  - Maps, Magic Markers, Minds (non GIS)
  - Overlay Analysis (both non GIS & GIS)
  - Suitability Analysis (advanced GIS)
- Conduct Landowner Analysis within Focus Areas
- Use and link Mission Statement with Prioritization Methods
Opportunistic Decision Making

- Opportunistic Projects
- Crisis Projects
- Land Trust Board
- Land Trust Capacity
- Rejected Projects

Diagram showing:
- State Park
- Land Trust Service Area
- River
- Land Trust Parcels
Strategic Land Conservation Decision Making

Land Trust Board Project Selection Criteria “Lens”
- Mission Statement
- Land Trust Policies
- Resource Inventories
- Assessment of Threats
- Project Feasibility
- Stewardship Responsible
- Public Benefits Tests

Land Trust Service Area
- Land Trust Focus Area
- State Park
- Land Trust Capacity
- Declined Projects or projects referred to more appropriate groups

Proactive Landowner Projects

Opportunist Projects

Crisis Projects
Setting Priorities: 
Project Selection Criteria

- Recommended Elements of Criteria:
  - Connected to Mission Statement
  - Examines Public Benefits (IRS) (SP 8a Public Benefits)
  - Considers Stewardship Responsibilities
  - Project Feasibility

- Written land trust policy that contains both criteria and a description of the evaluation process.
- Can be qualitative or quantitative or a combination.
- Links strategic thinking at the project level directly to the overall landscape approach of focus areas.
What are Focus Areas?

- High priority regions within a land trust service area.
- A tool within a strategic conservation planning process for prioritizing opportunities at a landscape level.
- Relates current land trust holdings to the landscape and links these lands with other protected lands.
- Examines a resource in an integrated fashion, meeting the overall needs of the resource to remain viable.
- Scale: above the individual parcel.
- Allows the land trust to be proactive and cultivate relationships with landowners.
- Based on resource inventories, on the ground knowledge, and a general assessment of threats to the resource.
Maps, Magic Markers, Minds (NonGIS)

- Required equipment: magic markers, hard copies of maps and decision makers.
- Outline your service area on the general map such as a gazetteer.
- Mark your current land holdings and other conservation lands.
- Tour your service area.
- Use existing hard copy maps of key resources.
- Hold a facilitated meeting with land trust decision makers, and technical resource specialists – armed with the map(s) and magic makers.
- Consider existing boundaries such as major geographic features, political boundaries, and existing protected lands.
- Consider drawing focus area boundaries based on resource needs and assessing threats to those resources.
Step 1. Add map layer A: one map layer represents a resource such as farmland, or habitat for a particular species of animal.

Step 2. Add map layer B: representing another resource, look for areas that both map layers A & B have in common.

Step 3. Add map layer C showing a third resource, look for areas where A, B and C all occur together.

Step 4. Display only the areas that A, B and C have in common.

Step 5. Draw Focus Area (in yellow) around the overlapping resource areas. Include an appropriate buffer area for protecting the resources, including overlaps of lesser areas (B&C).
Network Design Tools: Hub/Core/Corridor Delineation

Core Areas:
- Contain fully functional natural ecosystems
- Provide high-quality habitat for native plants and animals

Hubs:
- Slightly fragmented aggregations of core areas, plus contiguous natural cover

Corridors:
- Link core areas together
- Allow animal movement and seed and pollen transfer between core areas
Landowner Analysis

- Examine focus areas in detail
  - How much of a focus area is conservation land and how much land has been developed?
  - Calculate the acreage of the unprotected – undeveloped land with a focus area
  - Create a list of the parcels and owners of the unprotected-undeveloped land
  - What is the range in parcel size within the focus area?
  - What is the average size parcel within the focus area?
  - Consider the number and shape of parcels
Landowner Patterns

- Are all the landowners private individuals?
- Any large landowners – with multiple parcels?
- Families with different members owning different parcels?
- Family Trusts and other holding mechanisms
- Landowners enrolled in tax abatement programs – Incentive programs
- A lot of useful information for fundraising!!
Focus Area Fact Sheets

Summarize important information:

- Boundary description and acreage of focus area
- Reasons for selection and process used
- Number of acres currently protected
- Current land trust holdings within focus area
- Descriptions of natural resources present
- Summary of important landowners or categories of landowners within focus area
- Conservation goals (acreage or other)
Focus areas fact sheets are great for building or using as case statements.

**Hoosic Watershed PCA - Washington and Rensselaer Counties**

**Description**
The Hoosic Watershed PCA contains approximately 21,677 acres of agricultural land in the towns of White Creek and Cambridge in Washington County; plus Hoosick, Pittstown and Schaghticoke in Rensselaer County. The Hoosic Watershed PCA in Rensselaer supports a number of highly productive riverbottom farms.

The Hoosic is a major tributary of the Hudson River, and the combined Hoosic-Hudson Watershed drains southern Washington and northern Rensselaer Counties. Portions of this watershed are considered impaired by the Environmental Protection Agency due to run-off and pollution issues. Despite the impairment of water quality, wildlife depends on the river as important habitat, for example, a backwater located near Tiashoke Farms in Cambridge in Washington County contains a large heron rookery.

**Towns:** White Creek, Cambridge, Hoosick, Pittstown
Agricultural Land:
21,677 acres
ASA Conserved Land:
243.5 acres pending PDR
Total Conserved Land:
70.5 acres
5-year Goal: + 2,000 acres

**ASA’s Conservation Work**
ASA’s most recent PDR project, the 243.5-acre Tiashoke Farm, Cambridge, is located at the bend on the river downstream from the Buskirk Bridge. This farm buffers 7/8 of a mile of river frontage, and will protect an important riparian buffer along the Hoosic River.

**Land Conservation Goals**
Protect 2,000 acres within this PCA using private and public PDR and DDR mechanisms.
Contacting Private Individual Landowners

- You have generated focus areas and a list of landowners of unprotected – undeveloped lands
- Who contacts the landowners?
- How frequently do you follow-up with landowners after the initial contact?
- What is your response to a “Pleasantly firm ‘No’ or to a hostile ‘I am taking care of my land – leave me alone’”?
- This step is just like approaching a potential donor and thinking about the “ask” – how much to ask for, who does the asking, and how often for followup.
Step 4. Implementation

- Assessing Land Trust Capacity
  - Do you have the staff, volunteer, funding and other resources to carry out your vision?
  - Consider appropriate tools in context of capacity
  - Consider role of partners and collaboration

- Measuring Success
  - Quantitative: bucks and acres
  - Qualitative: sense of community etc.
  - Establish timeframe for revision

- Develop a “To Do List” or Action Plan
Land Trust Capacity

- Not uncommon to have a gap between aspirations and the current capacity of the land trust.
- A planning process helps the land trust decision makers start to really consider the true scale of the enterprise that they are undertaking.
- Tools such as focus areas or a well written plan can be used effectively to increase the capacity of the land trust.
- Partnering and collaboration are other ways to effectively increase the overall capacity that is brought to bear upon a conservation goal for a service area.
Strategic Conservation Plan Implementation

= Campaign Pyramid

Strategic Conservation Planning
- Calculate what it will take to make your plan happen
- Add up all possible funding sources (state, federal, local programs, private donations, foundation grants)
- Craft strategies to secure the funding
- Announce the plan

Capital Campaign Pyramid
- Identify lead donors
- Estimate the number of gifts at each major level of giving with donors in mind
- Quiet Stage – raise about 1/3 to ½ of your goal before announcing it to the public
- Go Public with the final stages of fund raising
Developing sound and accurate estimates for plan implementation is just like a capital campaign estimate - not “guesstimates”

IV. Implementing the Plan
Completion of the Farmland Conservation Plan sets ambitious goals for ASA. It will protect at a minimum an additional 10,000 acres of strategic farmland in the next five years, an average of 2,000 acres per year. This is double ASA’s current rate of land protection of 1,000 acres per year. If we meet this goal, ASA will have conserved 15,400 acres by January 2011.

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<th>Year</th>
<th>Annual Goal</th>
<th># of Projects</th>
<th>Total acres protected</th>
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<td>2007</td>
<td>+ 2,000 acres</td>
<td>11</td>
<td>9,200</td>
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<td>2008</td>
<td>+ 2,000 acres</td>
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<td>11,200</td>
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<td>2009</td>
<td>+ 2,000 acres</td>
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<td>13,200</td>
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<td>2010</td>
<td>+ 2,200 acres</td>
<td>13</td>
<td>15,400</td>
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* Please note that this is an estimation for planning purposes only.

Conserving 10,000 additional acres in the next five years will require additional resources to initiate and develop the projects, fund easement acquisition and project costs as well as steward and manage conserved farmland. We will evaluate the plan annually and expect to make adjustments accordingly.

ASA’s 10,000-Acre Farmland Conservation Campaign Budget
ASA will initiate a 10,000-acre Farmland Conservation Campaign to raise $2.2 million that will leverage the funding and private donations necessary to protect 10,000 acres of farmland with an estimated value of $23.2 million.

**Expenditures**
- Conservation Easement/PDR Acquisition: $19,092,000
- Project Transaction Costs: $1,875,000
- 5-Year Operating Costs: $1,975,000
- Campaign Costs: $310,000
  - Total Expenditures: $23,252,000

**Income**
- State and Federal PDR Grants: $10,052,000
- Donation of Development Rights: $6,100,000
- Private Foundation Support Pledged: $4,500,000
- **Amount Need to Raise**: $2,205,000
  - Total Income: $23,252,000

Beginning in 2006, we will be soliciting major gifts to raise the funding needed to support the 10,000-acre Farmland Conservation Campaign. This includes seeking out grants from state and federal programs and private foundations to raise the funding needed to purchase development rights on key farms. Potential funding sources are listed below.
A Snap Shot of Conservation Finance Tools*

**Philanthropic Capital**
- Traditional Sources
  - Individual Donors
  - Foundations
  - Businesses and Corporations
  - Individual, Corp. & Nonprofit Partners
- Voluntary Surcharges
- Voluntary Private Transfer Fees
- Trade Lands
- Donor-advised Funds and & Aggregators
- Web and Phone applications

**Tax Benefits**
- Federal/State Tax Deductions
- New Market Tax Credits
- State Transferable & non trans. tax credits

**Public Capital**
- Fed. Conservation Programs (LWCF etc)
- Special Fed/State Designation
- State/local Bond Measures
- State/local Conservation Programs

**Private Capital**
- Compensatory Payments
  - Habitat & Species Mitigation/Banking
  - Function Trading (Nutrient, Carbon)
  - Nature Resource Damage (Other Env. Settlement)
  - Federal Power Act
- Conservation Development
- Income from Conservation Land
- Fee for Services
- Conservation Investors
- Conservation Investment Notes

**Financing**
- Philanthropic
  - External Revolving Loan Funds
  - Internal Protection Funds
  - Foundations (PRIs)
  - Conservation Lenders & Guarantors
- Private
  - Commercial Bank Lending
  - Farm Credit Landing
  - Seller Financing
- Public
  - Fed/State/City Revolving Loan Fund
  - Tax-Exempt Debt

*Story Clark, Land Trust Alliance Rally 2010*
What opportunities exist in this process?

• Insider
• Actively cultivating
• Learning donor interest
• Opportunity to meet new donors early
How are we going to bridge the gap?

→ Borrow Money

Other ways to get there?
  • Friendly Seller
  • Conservation Buyer
  • National Group Involvement
Why Borrow Money?

• Organizational growth in key areas:
  – Staff expertise
  – Donor base
  – Major donor relationships
  – Board engagement
  – Community relationships
  – Community Profile
  – Sophistication
  – Others?
Assessment

Where is the Organization?
What are our other deals?
Who are our donors?
Who is this a priority for?
Borrower’s Challenges

- What’s the takeout?
- Collateral & Cash Flow?
- Communication
- Understand the ramifications
- Time
MEASURING SUCCESS

Not everything that can be counted counts and not everything that counts can be counted.

Albert Einstein
How to Measure Success

- Create goals and metrics that are not just what you can accomplish but what you **need to accomplish** to change the situation.
- Useful metrics have the following attributes:
  - Impact Oriented
  - Measurable
  - Time limited
  - Specific (geographically and/or resource type)
  - Easily Understood
- Consider the degree of control the land trust has over the results to be measured.
- Remember to try to measure public benefits that are cited in an easement.
- Prepare to listen for subtle changes in landowner attitudes, improvements to quality of life and other qualitative measures.
Landowner Contact Measures

- Include measures for contacting landowners in your plan
- How many landowners have you contacted within your focus areas in a year?
- Consider tracking/measuring the type of communication used (email, phone, meeting over coffee)
- How many projects within your focus areas are you doing vs. how many projects outside of your focus areas (pro-active vs. opportunist projects)
New Resources- Peer Networks

- Green infrastructure peer network – matches experienced partners with those new to planning. Deadline March 31st
  [http://www.greeninfrastructure.net/gi_peer_exchange](http://www.greeninfrastructure.net/gi_peer_exchange)

- Regional Plan Association and America 2050
  Funding for collaboration – Due March 16th
  [http://www.rpa.org/northeastlandscapes/pep](http://www.rpa.org/northeastlandscapes/pep)
My Background

EDUCATION
B.A. Government, Colby College
MCP, Environmental Planning, MIT

EXPERIENCE
Public Agencies – EPA, NPS, DOE and EOEA
Nonprofits – The Conservation Fund, Sudbury Valley Trustees, Consensus Building Institute
Educator/Researcher – Cornell University and Conservation Leadership Network
Consultant – Land Conservation & Planning

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