



**Board Boot Camp 201:
Core Functions of a Land Trust**

RHODE ISLAND LAND & WATER CONSERVATION SUMMIT

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Workshop Goal

Establish a basic understanding of the technical aspects of
land protection and stewardship for both conservation
easements and fee owned land.

Mission:

The Land Trust Alliance works to save the places people need and love by strengthening land conservation across America.

CELEBRATING 35 YEARS 1982-2017

What We Do

Improve the quality and rigor of land conservation

The ethical and technical guidelines for the responsible operation of a land trust

LAND TRUST
Standards and Practices
Ethical and Technical Guidelines for the Responsible Operation of a Land Trust

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Standards & Practices Themes

- The credibility of the land trust community rests on the legal and ethical action of all members
- Land trusts must be responsive to and engage their community
- Sustainable organizations rely on written documentation, policies and procedures, and financial stability
- Stewardship and defense capacity essential for ensuring lasting protection



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12 Standards

Governance	{	Ethics, Mission and Community Engagement Compliance with Laws Board Accountability Conflicts of Interest
Strong Organizations	{	Fundraising Financial Oversight Human Resources
Land Protection	{	Evaluating and Selecting Conservation Projects Ensuring Sound Transactions Tax Benefits and Appraisals
Stewardship	{	Conservation Easement Stewardship Fee Land Stewardship



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Standard 8. Evaluating and Selecting Conservation Projects

- A. Strategic Conservation Planning
- B. Project Selection Criteria and Public Benefit
- C. Project Evaluation
- D. Project Planning
- E. Partnership Documentation

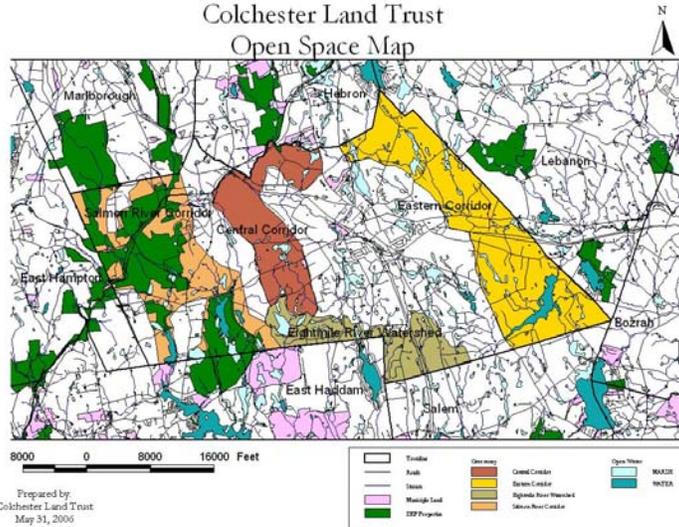




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Strategic Conservation Plan

Colchester Land Trust Open Space Map



Sample Selection Criteria

Criteria	Score
Aquifer protector	0
Scenic quality	0
River and stream protector	0
Links to existing open space	0
Farmland	0
Historic significance	0
Land suitable for passive recreation	0
Significant wildlife	0
Size	0
Provide relief from high density land use	0
Total	0

Rate each item 1 - 10

No project below 40 should be considered

Project 40 - 50 deserves reserved consideration, low priority

Project 50 - 60 needs further investigation, but is a mid priority

Project 60 - 70 is a high priority, deserves funding

Few projects will rank above 70,

if so, no question as to conservation value

Ask each board member to complete criteria independently and take a consensus of the board

Standard 9. Ensuring Sound Transactions

- A. Legal Review and Technical Expertise
- B. Legal and Financial Advice
- C. Environmental Due Diligence
- D. Determining Property Boundaries
- E. Conservation Easement Drafting

Standard 9 Ensuring Sound Transactions (cont.)

- F. Title Investigation and Recording
- G. Recordkeeping
- H. Purchasing Land or Conservation Easements
- I. Selling or Transferring Land or Conservation Easements



Standard 10. Tax Benefits and Appraisals

- A. Landowner Notification
- B. Legal Requirements: Land Trust Responsibilities
- C. Avoiding Fraudulent or Abusive Transactions



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Standard 11. Conservation Easement Stewardship

- A. Funding Conservation Easement Stewardship
- B. Baseline Documentation Report
- C. Conservation Easement Monitoring
- D. Landowner Relationships
- E. Conservation Easement Enforcement



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Calculating Stewardship & Legal Costs

**Colchester Land Trust
Stewardship Calculator
4/6/2014**

Stewardship Cost Estimate:

Management Plan Preparation (Fee) _____

Baseline Documentation (Easement) _____

Landowner Relations (Easement) _____

Enforcement (Easement) _____

Grantee Approval (Easement) _____

Annual Monitoring _____/yr

Administration _____/yr

Risks/High-Cost Scenarios:

Fee only: Special Start-up Costs (e.g. habitat restoration, creation of trails or infrastructure, special signage, site cleanup, outreach to neighbors and community, ecological/biological surveys, brochures/maps, fencing, etc.):

Fee Only: Ongoing Management Costs (e.g., invasives control, trail maintenance, habitat maintenance, mowing, etc.):

Estimated Per-Annum Cost: _____

Principal Needed to Generate Income _____

Equal to Per-Annum Cost: _____

Stewardship Commitment/Assessment: \$ _____

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Violation Types

1. **Minor:** A minor violation is defined as actions that have a measurable negative effect on the conservation values of the easement, terms of the easement and/or violate the conservation purposes

2. **Moderate:** A moderate violation is defined as actions that cause substantial negative impact to the conservation values of the easement or the easement terms

3. **Major:** A major violation is defined as having a permanent negative impact to the conservation values and purpose of the easement or easement terms

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Standard 11 (cont.)

- F. Approvals and Permitted Rights
- G. Contingency Strategy
- H. Amendments
- I. Condemnation
- J. Partial or Full Extinguishment

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Standard 12. Fee Land Stewardship

- A. Funding Land Stewardship
- B. Land Management and Stewardship
- C. Inspecting Land Trust Properties
- D. Contingency Strategy
- E. Condemnation



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Land Trust Standards and Practices and your Land Trust

- Land Trust Alliance members must adopt the 2017 Standards
- All land trusts are encouraged to implement the Standards at a pace appropriate for their organizations



Rhode Island Land Trust Council & Land Trust Alliance Resources

- Rhode Island Land & Water Partnership Resource Library - <http://www.landandwaterpartnership.org/library.php>
- Land Trust Alliance Learning Center: <http://learningcenter.lta.org>
- Land Trust Standards and Practices Curriculum
- Training, conferences, online learning and webinars

