

# Strategic Conservation Planning and Engagement Part 1

**Regional Conservation Partnership Conference**

**November 13, 2012**

Ole M. Amundsen III, The Conservation Fund (TCF)

With Special Guest – Reggie Hall, TCF

**Special Thanks to Highstead, Regional Plan Association, MassConn  
Sustainable Forest Partnership and Harvard Forest**



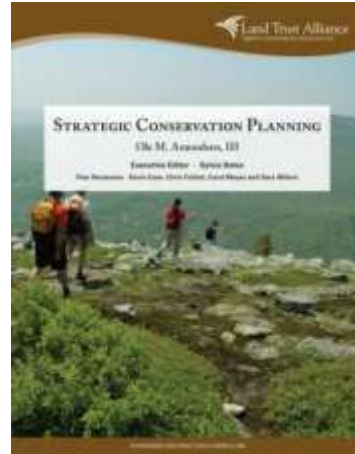
## What is Today About?

- Two part training on strategic conservation –with insight into steps in capital campaigns and finance
- Original training focused individual land trusts
- Cross walk to RCPs via MassConn Case Study
- Organizational members of RCP need their own priorities to participate fully in a RCP
- Many of the steps are the same – whether for a RCP or a solo group like a land trust



## 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

## Conservation Planning and Fundraising

*Gentlemen we have run out  
money: now we have to think.*

Winston Churchill

## 2010 Land Trust Census

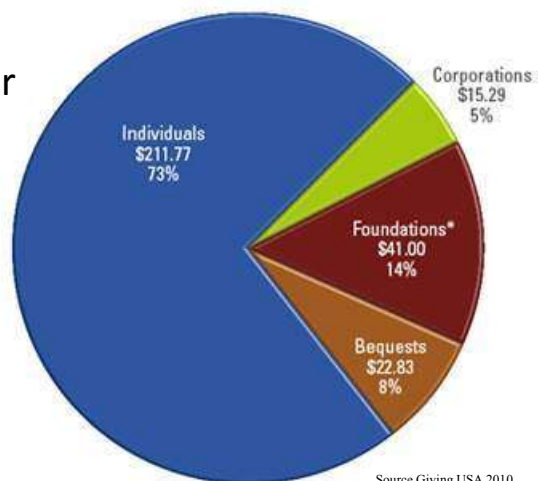
Land Trusts that have plans protected twice as much land as land trusts without plans.

Conserving Land Strategically

GEOGRAPHY	STRATEGIC CONSERVATION PLAN?	NUMBER OF ORGANIZATIONS	AVERAGE ACRES CONSERVED
Entire US	Yes	564	16,051
	No	240	8,203
Midwest	Yes	96	7,210
	No	42	2,985
Northeast	Yes	258	9,122
	No	116	7,832
Northwest	Yes	51	36,280
	No	14	5,596
Pacific	Yes	63	22,030
	No	12	5,753
Southwest	Yes	63	20,800
	No	29	8,228
Southwest	Yes	34	37,143
	No	27	19,407

## Plans Connect You to Individuals

Individuals account for the majority of US Charitable giving.



Source Giving USA 2010

## The Planning Process

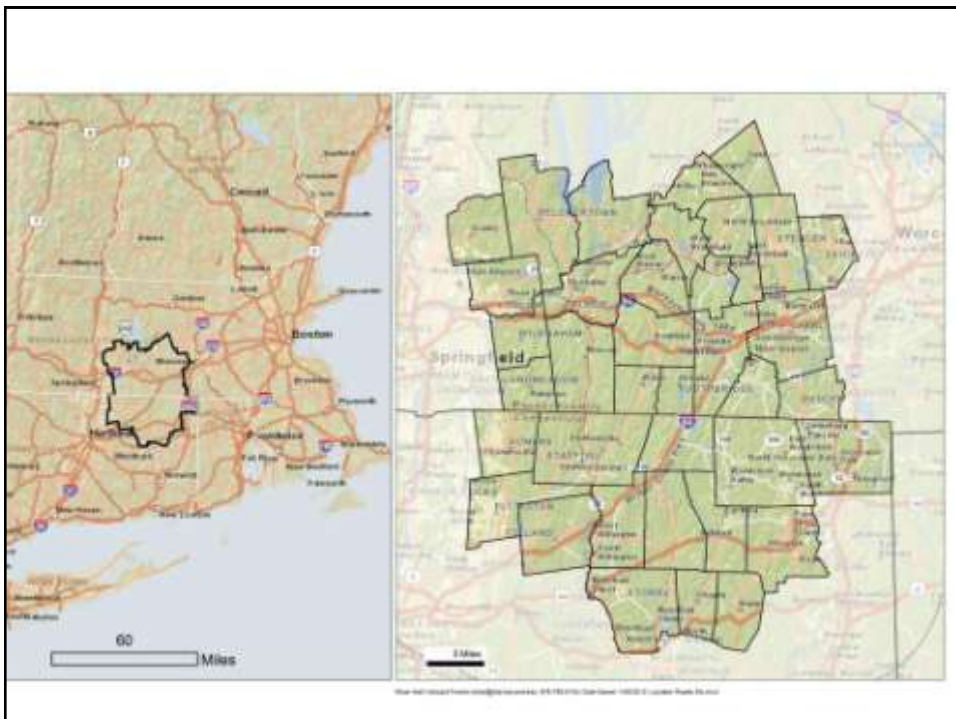
- ☐ Step 1: Getting Started
- ☐ Step 2: Understanding your Community
- ☐ Step 3: Setting Priorities
- ☐ Step 4: Implementation

## 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

## Mission Statement

- MassConn is a voluntary association of land trusts, conservation organizations, state agencies, and foresters serving a region of 35 towns spanning the border of South-Central Massachusetts and Northeastern Connecticut.



## Who is MassConn?

### Public Member Groups:

Massachusetts: UMass Extension Forest Conservation Program, Monson Conservation Commission, MassWildlife (MA Dept. of Fish and Game).

Connecticut: UConn Forestry & Natural Resources Extension Center, Stafford Conservation Commission

### Private Member Groups:

Massachusetts: Opacum Land Trust, East Quabbin Land Trust, Common Ground Land Trust, Minnechaug Land Trust, Harvard Forest, The Trustees of Reservations, Mass Audubon, Gerrish Forestland Products

Connecticut: Highstead, CT Forest & Park Association, CT Land Conservation Council, Northern CT Land Trust, New Roxbury Land Trust, Joshua's Tract Conservation & Historic Trust, Scantic River Watershed Association, Hull Forest Products

Regional: The Norcross Wildlife Foundation, Norcross Wildlife Sanctuary, LandVest, The Trust for Public Land, The Nature Conservancy, New England Natural Resource Center, True North

## 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.

## Funding Your Planning Effort

- Consider local universities' student workshops
- Community foundations
- National Park Service Rails and Trails Technical Assistance program – free technical help
- Work with Local 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?
- ☐ Goals of existing land trust plans, municipal open space plans, state plans that are relevant to your region
- ☐ What are the mandates that the plan must fulfill?
- ☐ What is the anticipated final product of the planning process?

## MassConn – What We Do:

Identify key areas of the region for conservation, collaborate on land protection efforts, promote sustainable forestry practices, and organize public outreach and education efforts in order to increase the pace and efficacy of conservation in the MassConn area.

## What do Call Your Effort?

Nashville Experience -

**PROPOSED NAMES :**

ELEVEN BENDS

PICKING AND GREENING

HEART OF GREEN

ALL ABOUT GREEN

**PROPOSED TAG LINES:**

PICKING AND GREENING NASHVILLE'S FUTURE

CONSERVING THE PLACES THAT MATTER

RESTORE, ENHANCE, AND PROTECT NASHVILLE'S  
PLACES FOR FUTURE GENERATIONS

A CONSERVATION ACTION PLAN FOR NASHVILLE

Nashville Open Space Plan: Creating, Enhancing  
and Preserving the Places that Matter



## 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!**

## MOU or Not

### Advantages to MOU

- Clarity –
- Statement of shared goals
- Prevents misunderstanding
- Makes differences known
- Makes the work real
- Marketing tool, Foundations may view it positively

### Advantages to No MOU

- Flexibility – nothing to change or amend
- Not bureaucratic, process focused on the problems not the process
- More open to silent partners
- Perceived as more open, no informal barriers or “old guard”

## Step 2.

# Understanding Your Community

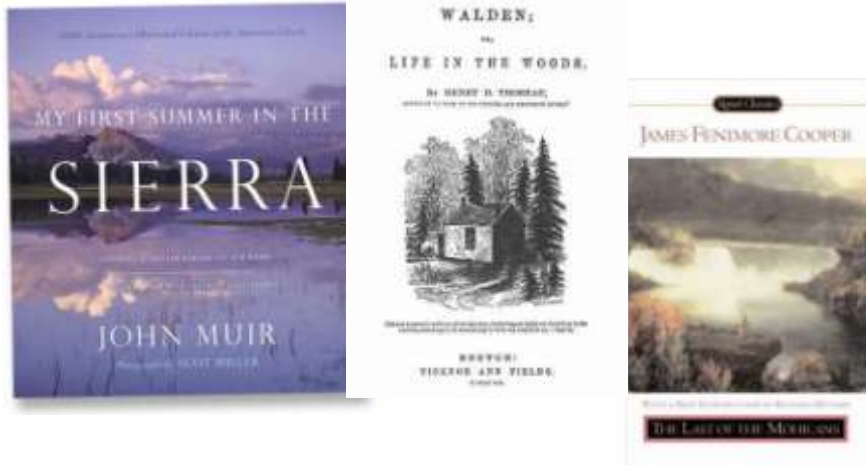
- Identify and Gather Information
  - Inspirational Information
  - Technical & Reference Information
  - Mapping Information
  - Resource Inventories
- Analyze Information
  - Explore Local History and Demographics Trends
  - Create a Map of Conserved Land
  - Use Resource Inventories
  - Assess Threats 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(s) and conservation community** 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



## Inspirational Information Exercise

- ☐ List three books (fiction or nonfiction) that take place in your service area and that describe the landscape, culture and natural resources.
- ☐ List three artists who have painted or taken photos of landscapes in your service area.
- ☐ List three local people to interview who may have compelling stories that link the landscape with its people.

## Technical Information

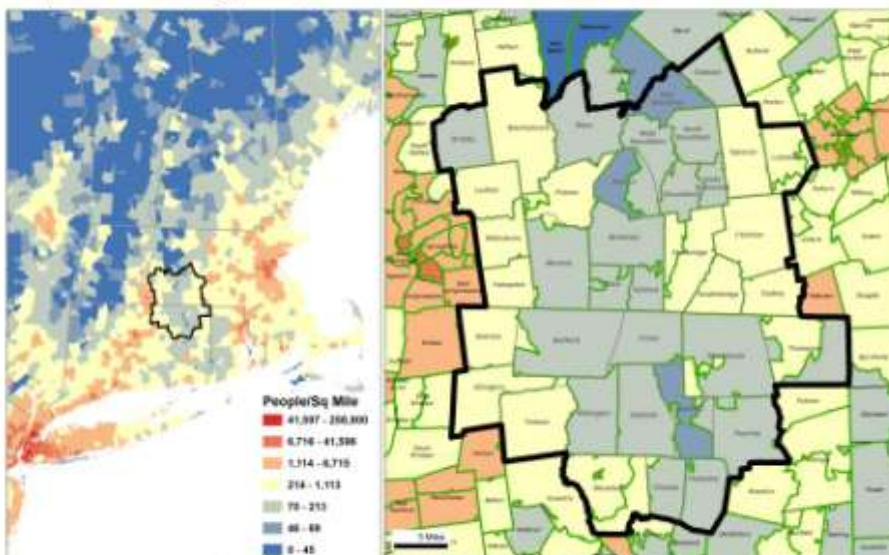
### Statewide Planning Studies

- ☐ 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!

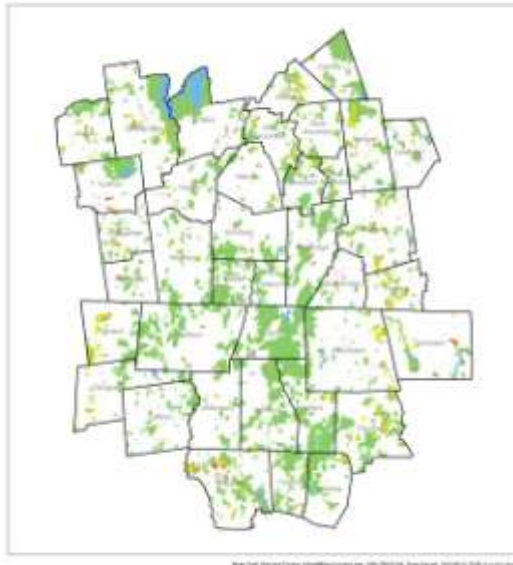
### Population Density (2010)



Data from US Census and compiled by ESR. List is zipcode.

Source: Vermont Center for Ecosystems and the Environment, Vermont Population Density

### Protected Open Space - What is Protected?



#### Farms, Forest, Water, Wetlands:

~ 175,000 Acres Protected

~ 23% Of Region

#### How Much Of Each Is Protected?

26% of Forest

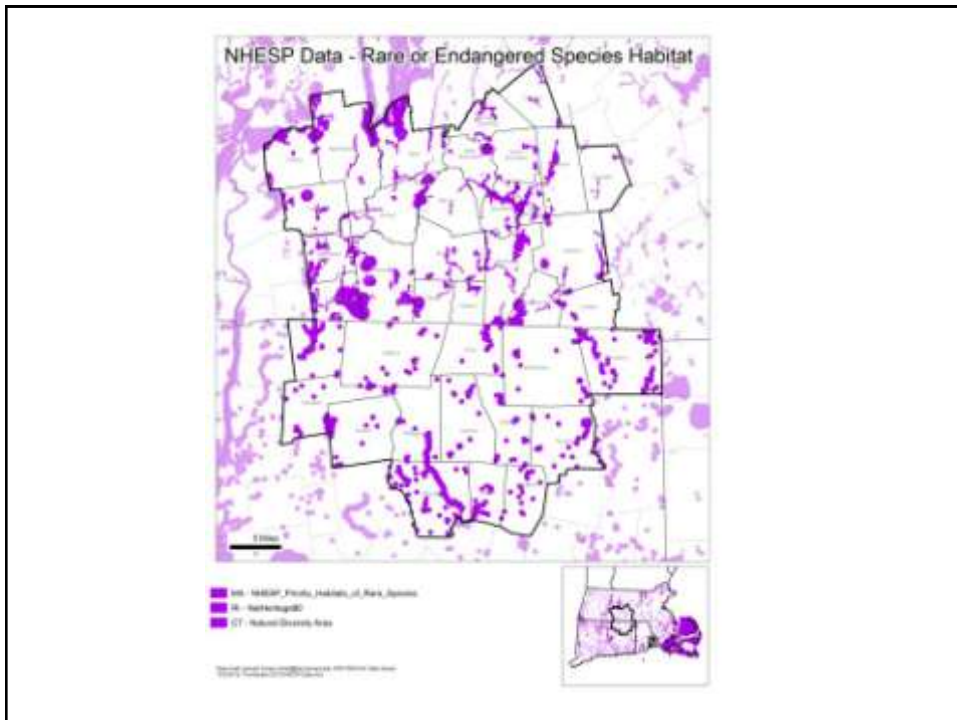
19% of Farm Fields

49% of Ponds/Lakes

42% of Wetlands

## Building and Using Conservation Resource Inventories

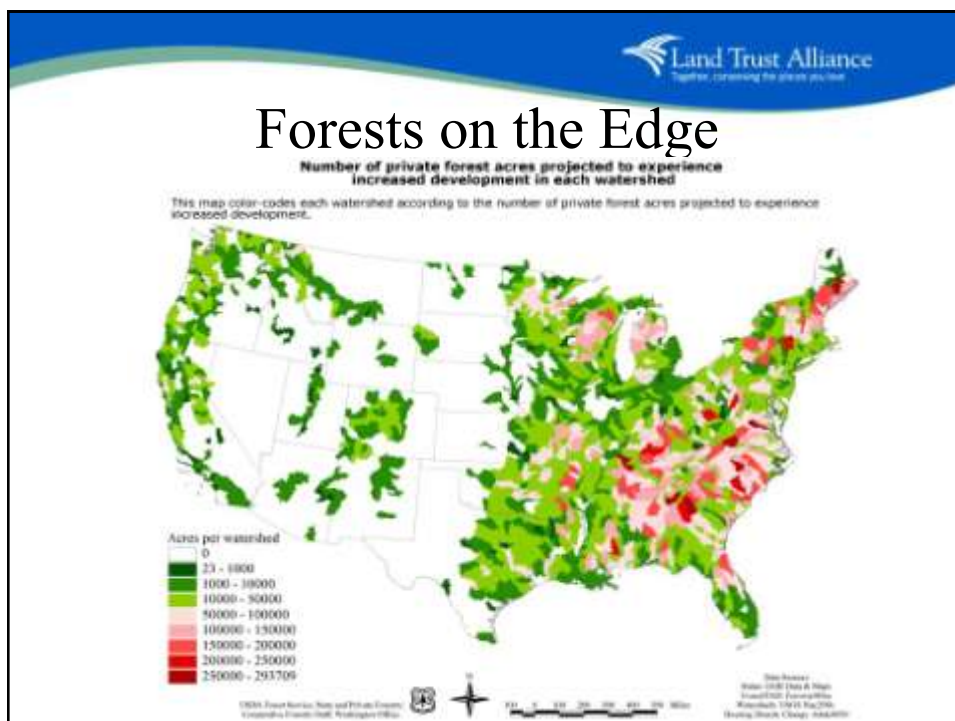
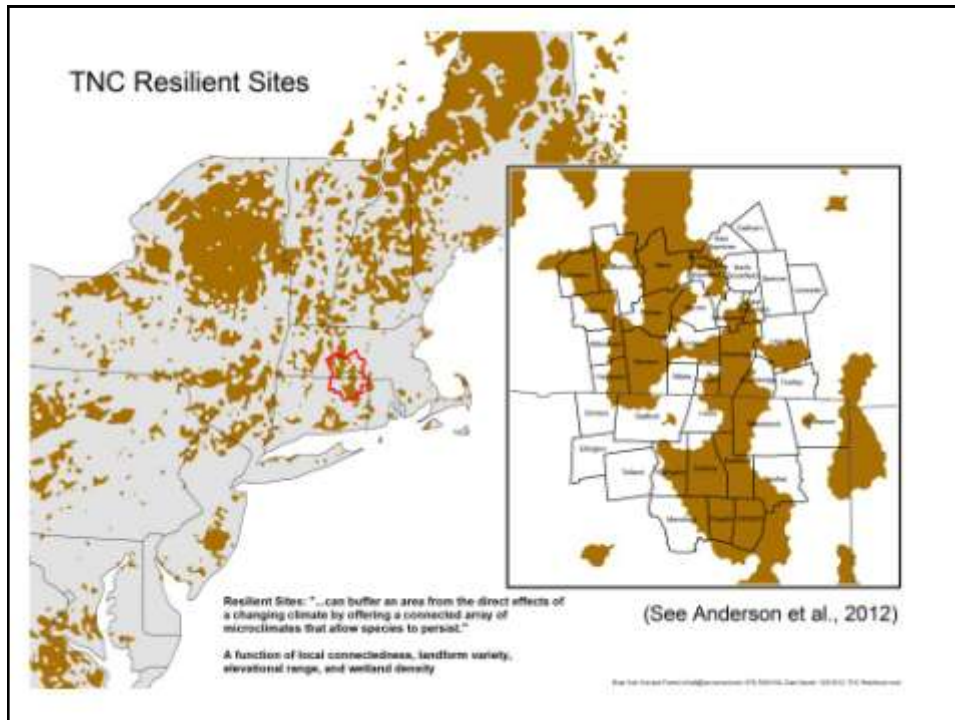
- ☐ Scenic Resource Inventory
  - ☐ Scenic Viewsheds
  - ☐ Scenic Byways
  - ☐ Wild and Scenic Waterways
  - ☐ Trails maps (hiking, snowmobiling, x-c skiing)
  - ☐ Historic districts and landmarks
- ☐ Natural Resource Inventory
  - ☐ Land Cover Maps
  - ☐ Rare and Endangered Species and Natural Communities (Natural Heritage & Endangered Species Program or other similar state program)
  - ☐ Important Bird Areas
  - ☐ Wetlands Layer (state and federal)
  - ☐ Soils Data
  - ☐ Rivers, streams and lakes



## 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?





# CanVis

Text and images courtesy of Juliana Harris, Town of Fairfield, Connecticut, Engineering Department



Text and images courtesy of Brian G. George, Ohio Department of Natural Resources



<http://www.csc.noaa.gov/digitalcoast/tools/canvis/index.html>

## Strategic Conservation Planning and Engagement Part 2

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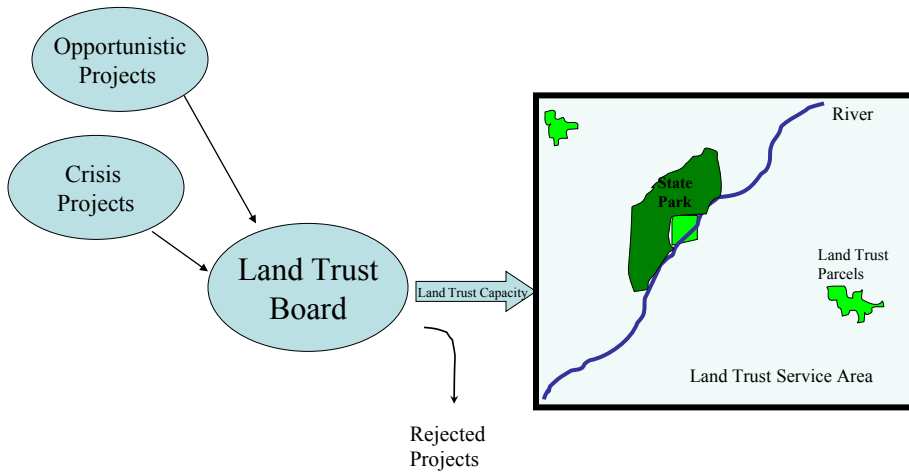
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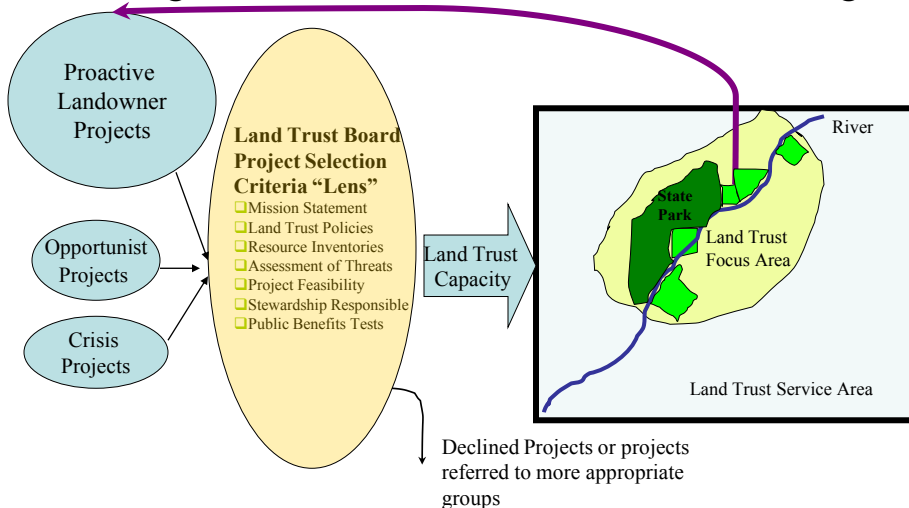
## Step 3. Setting Priorities

- ☐ 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



## Strategic Land Conservation Decision Making



## Setting Priorities: Project Selection Criteria

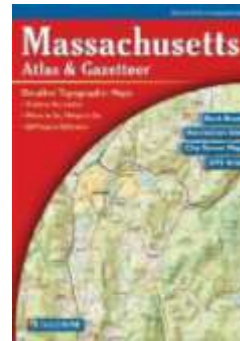
- ❑ Recommended Elements of Criteria:
  - ❑ Connected to Mission Statement
  - ❑ Examines Public Benefits (IRS) (SP 8a Public Benefits)
  - ❑ Considers Stewardship Responsibilities
  - ❑ Project Feasibility
- ❑ Written land trust policy that contains both criteria and a description of the evaluation 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 or among a group of conservation organizations.
- ❑ 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)

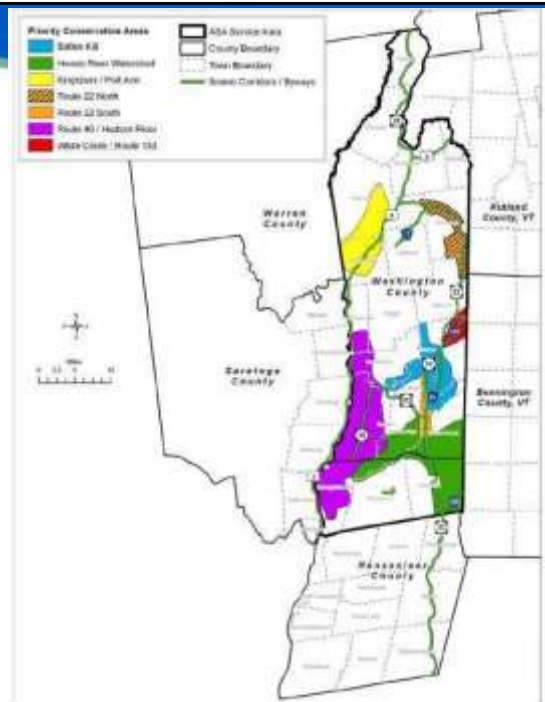
- ❑ Required equipment: magic markers, hard copies of maps and decision makers.
- ❑ Outline your service area on the general map such as a gazetteer.
- ❑ Mark your current land holdings and other conservation lands.
- ❑ Tour your service area.
- ❑ Use existing hard copy maps of key resources.
- ❑ Hold 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.



### Agricultural Stewardship Association, NY

**Goal: 10,000 acres by 2010**

**Priority Conservation Areas** contain significant amounts of high quality farmland that are conducive to a long-term business environment for agriculture. These are areas with concentrations of Anchor Farms and farmland containing high quality soils near water resources.



## Overlay Analysis (NonGIS & GIS)

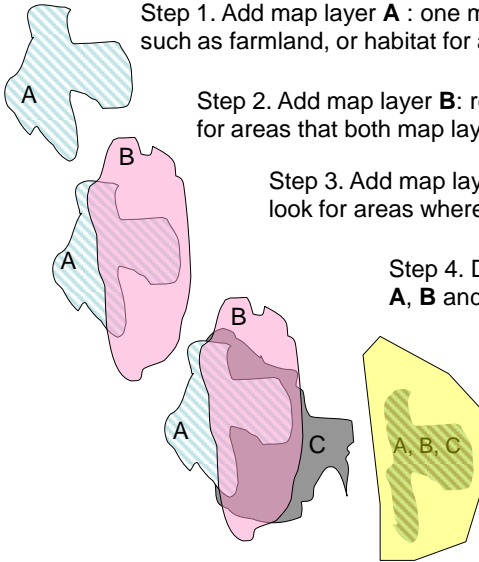
Step 1. Add map layer **A** : one map layer represents a resource such as farmland, or habitat for a particular species of animal

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).

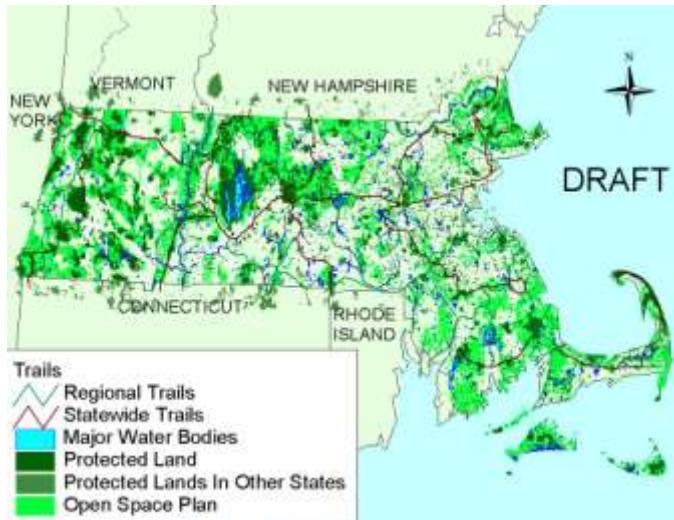


# Gathering Waters Conservancy

## “Landscapes of Opportunity”

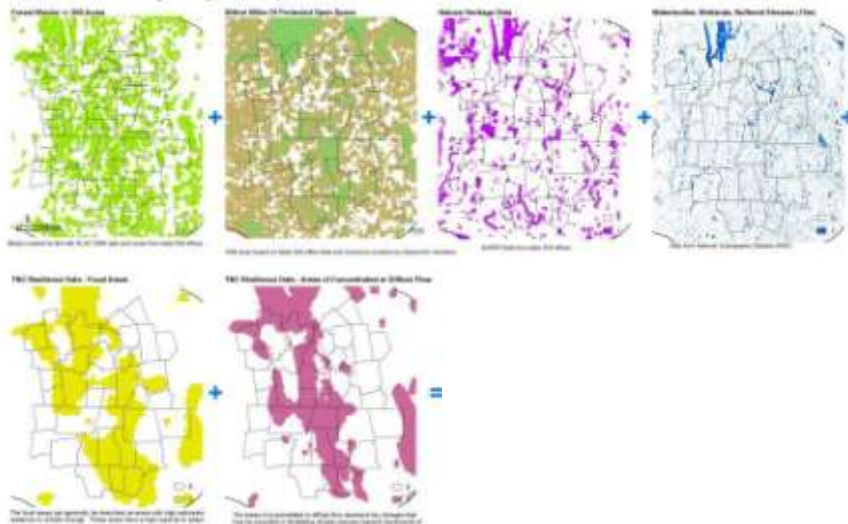


## MA Land Conservation Plan Wildlands and Woodlands



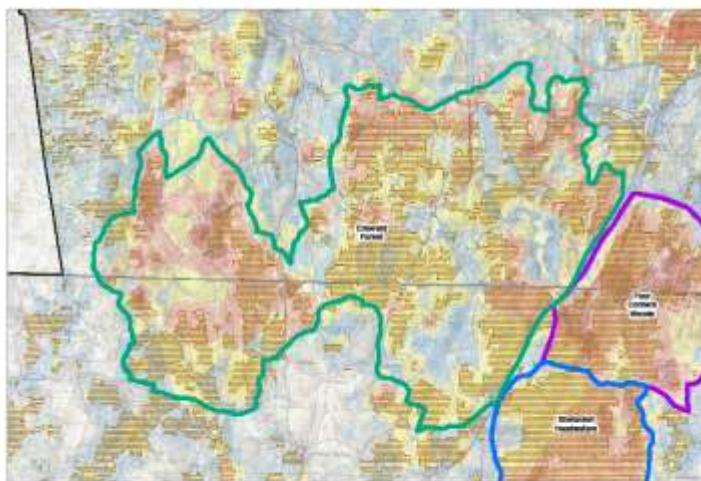
## Suitability Analysis - MassCon

Conservation Suitability Analysis - Sept. 2012









Emerald Forest

Protected Recreational or Open Space  
Soils (Number of Layers)

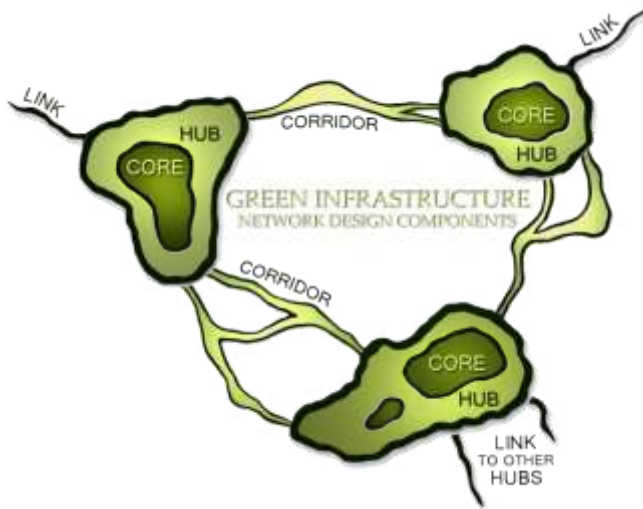
9 2  
4 1  
3 6

1:140,000

0 5 Miles  
Draft Forest Areas System CCRP Nov 9, 2012 2012



## Network Design Tools: Hub/Core/Corridor Delineation



### Core Areas:

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

### Hubs:

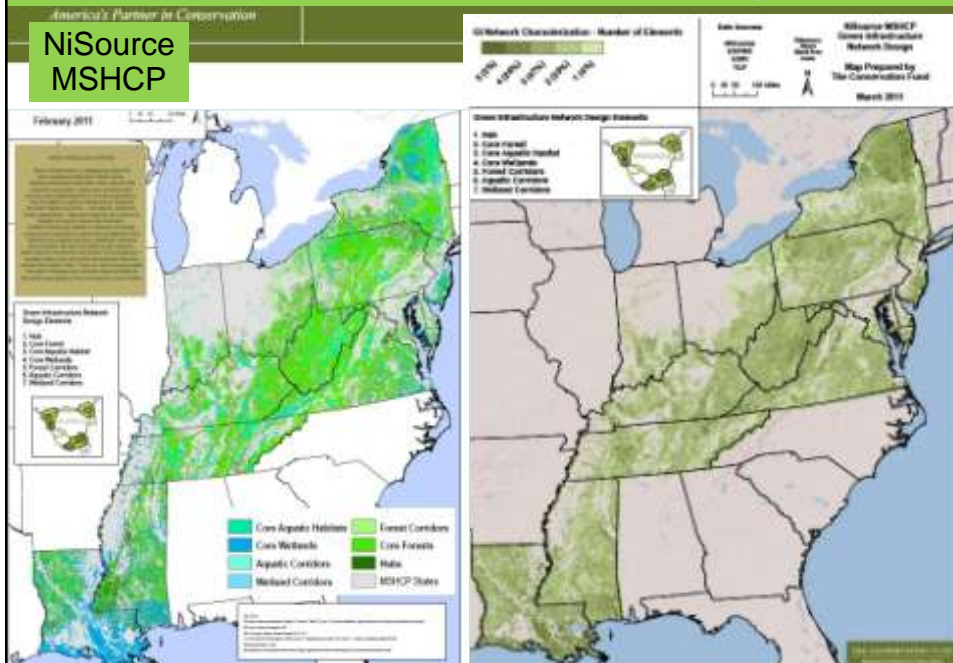
- Slightly fragmented aggregations of core areas, plus contiguous natural cover

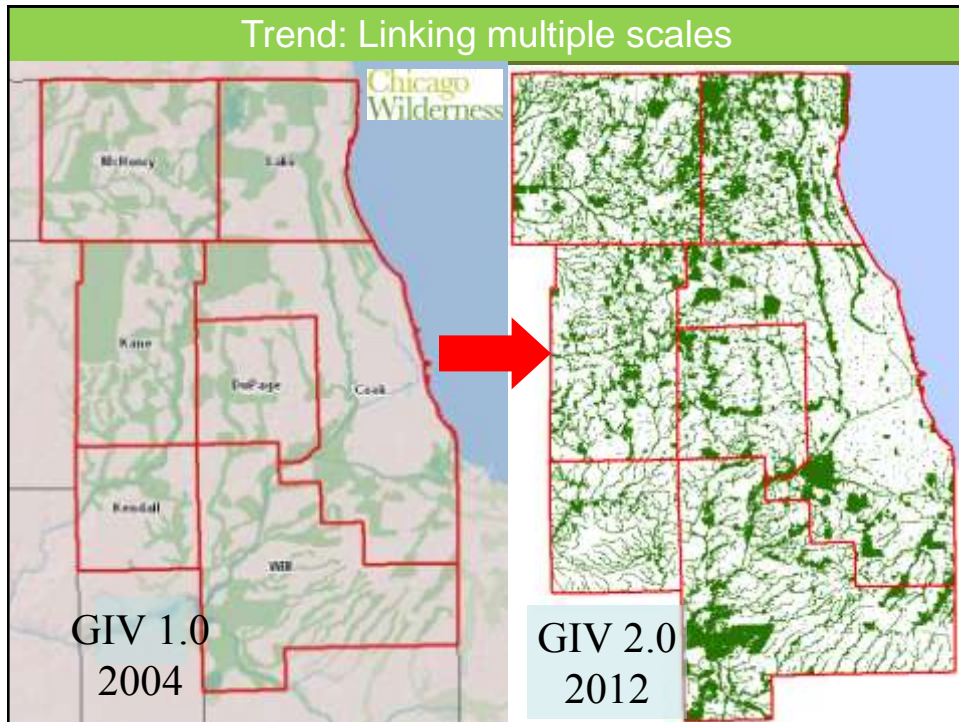
### Corridors:


- Link core areas together
- Allow animal movement and seed and pollen transfer between core areas

49

## Green Infrastructure Network Design





 Land Trust Alliance  
Together, conserving the planet you love

## 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)

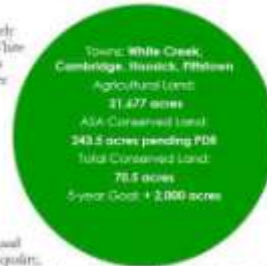
*Focus areas  
fact sheets are  
are great for  
building  
or using as case  
statements*

#### Hoosier Watershed PCA - Washington and Rensselaer Counties

##### Description

The Hoosier Watershed PCA contains approximately 21,677 acres of agricultural land in the towns of White Creek and Cambridge in Washington County plus Hoonah, Parstown and Schaghticoke in Rensselaer County. The Hoosier Watershed PCA in Rensselaer supports a number of highly productive agricultural farms.

The Hoosier is a major tributary of the Hudson River, and the combined Hoosier-Hudson Watershed drains southern Washington and northern Rensselaer Counties. Portions of this watershed are considered impaired by the Environmental Protection Agency due to soil and pollution issues. Despite the impairment of water quality, wildlife depends on the river as important habitat, for example, a bald eagle nested near Tishkoke Farm in Cambridge in Washington County contains a large loam meadow.



Cambridge Farm with Hoosier River, Cambridge

##### ASA's Conservation Work

ASA's most recent PDR project, the 243.5-acre Tishkoke Farm, Cambridge, is located in the head on the river downstream from the Bunkirk Bridge. This farm buffers 7/8 of a mile of river frontage, and will protect an important riparian buffer along the Hoosier 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.**

Who are the 4.2 million people who own 200 million acres of America's forests?

Woodland Retreat



Supplemental Income



Working the Land



Uninvolved



How do we reach them with effective messages, programs and services?

## Tools for Engaging Landowners Effectively Knowing Your Audience Makes for Better Results

[www.engaginglandowners.org](http://www.engaginglandowners.org)

Research by the Sustaining Family Forests Initiative

[sustainingfamilyforests.org](http://sustainingfamilyforests.org)



## Step 4. Implementation

- ❑ Assessing Conservation 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

## Conservation Capacity

- ❑ Not uncommon to have a gap between aspirations and the current capacity of the conservation organization(s).
- ❑ A planning process helps 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.

## Conservation Plan & 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 1/2 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. That is double ASA's current rate of land protection of 1,000 acres per year. If we meet this goal, ASA will have conserved 15,000 acres by January 2011.

Year	Annual Goal *	# of Projects	Total acres protected
2006	+ 1,000 acres	11	7,200
2007	+ 2,000 acres	13	9,200
2008	+ 2,000 acres	13	11,200
2009	+ 2,000 acres	13	13,200
2010	+ 2,000 acres	13	15,400

\* Based on the fact that this is an estimate for planning purposes only.

Conserving 10,000 additional acres in the next five years will require additional resources to acquire 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 \$21.2 million.

##### Expenditures

Conservation Easement/PDR Acquisition	\$19,052,000
Project Transaction Costs	\$ 1,875,000
5-Year Operating Costs	\$ 1,073,000
Campaign Costs	\$ 700,000
<b>Total Expenditures</b>	<b>\$23,522,000</b>

##### Income

State and Federal PDR Grants	\$10,052,000
Donations of Development Rights	\$ 6,100,000
Private Foundations Support Pledged	\$ 4,500,000
<b>Amount Need to Raise</b>	<b>\$ 2,810,000</b>
<b>Total Income</b>	<b>\$23,522,000</b>

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 Lending
  - ❑ Seller Financing
- Public
  - ❑ Fed/State/City Revolving Loan Fund
  - ❑ Tax-Exempt Debt

\*Story Clark, Land Trust Alliance Rally 2010

## How Do You Want To Grow?

Organizational growth in key areas:

- Staff expertise
- Donor base
- Major donor relationships
- Board engagement
- Community relationships
- Community Profile
- Sophistication
- Balance Sheet
- Others?



## Are You Ready To Go?



**Where is the Organization?**

**What are our other deals?**

**Who are our donors?**

**Who is this a priority for?**

**What's our balance sheet look like?**



## What's Holding You Back?

### Borrowing Fears

- Risk adverse board
- Splitting the membership/mission drift
- Liquidity
- Collateral
- Over-commitment
- Borrowing too much/too little
- Right project?
- Sense of urgency maintenance
- Default
- Deep pocket perception
- Charity navigator score

### Fundraising Fears

- Good fund raising plan?
- Donor fatigue
- Large enough donor base?
- Lack of history of large gifts
- People to make the ask
- How strong is the board?
- How strong are you at making the ask?

## In The Beginning...

	Happy Valley Land Trust (1982)	Unhappy Valley Land Trust (1987)	The Nature Conservancy (1951)
<b><u>Assets:</u></b>			
Cash	\$0	\$0	\$0
Endowment/Investment	\$0	\$0	\$0
Conserved Lands	\$0	\$0	\$0
Other Assets	\$0	\$0	\$0
<b><u>Total Assets:</u></b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b><u>Liabilities:</u></b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b><u>Net Worth:</u></b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b><u>Net Worth Less Protected Land:</u></b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

THE CONSERVATION FUND <i>America's Partner in Conservation</i>		Progression of TNC	
	TNC (2007)	TNC (2012)	% Change
<b><u>Assets:</u></b>			
Cash	\$54.8M	\$73M	+33%
Endowment/Investments	\$2.1B	\$1.9B	-16%
Conserved Lands	\$3.0B	\$3.7B	+23%
Other Assets	\$245M	\$398M	+62%
<b><u>Total Assets:</u></b>	<b>\$5.4B</b>	<b>\$6B</b>	<b>+11%</b>
<b><u>Liabilities:</u></b>	<b>\$688M</b>	<b>\$785M</b>	<b>+14%</b>
<b><u>Net Worth:</u></b>	<b>\$4.7B</b>	<b>\$5.2B</b>	<b>+11%</b>
<b><u>Net Worth Less Conserved Land:</u></b>	<b>\$1.7B</b>	<b>\$1.5B</b>	<b>-11%</b>

THE CONSERVATION FUND <i>America's Partner in Conservation</i>		Progression of UVLT	
	UVLT (2007)	UVLT (2012)	UVLT % Change
<b><u>Assets:</u></b>			
Cash	\$46K	\$60K	+30%
Endowment/Investments	\$0	\$0	+0%
Conserved Lands	\$1.9M	\$2.5	+31%
Other Assets	\$167K	\$225K	+34%
<b><u>Total Assets:</u></b>	<b>\$2.2M</b>	<b>\$2.8M</b>	<b>+27%</b>
<b><u>Liabilities:</u></b>	<b>\$165K</b>	<b>\$1.2M</b>	<b>+727%</b>
<b><u>Net Worth:</u></b>	<b>\$2M</b>	<b>\$1.6</b>	<b>-20%</b>
<b><u>Net Worth Less Conserved Land:</u></b>	<b>\$100K</b>	<b>(\$900K)</b>	<b>-1000%</b>

THE CONSERVATION FUND <i>America's Partner in Conservation</i>		Progression of HVLТ	
	HVLТ (2007)	HVLТ (2012)	HVLТ % Change
<b><u>Assets:</u></b>			
Cash	\$1.0M	\$1.1M	+10%
Endowment/Investments	\$900K	\$4.4M	+380%
Conserved Lands	\$16.8M	\$19.5M	+16%
Other Assets	\$147K	\$262K	+78%
<b><u>Total Assets:</u></b>	<b>\$18.8M</b>	<b>\$25.3M</b>	<b>+34%</b>
<b><u>Liabilities:</u></b>	<b>\$106K</b>	<b>\$860K</b>	<b>+700%</b>
<b><u>Net Worth:</u></b>	<b>\$18.7M</b>	<b>\$24.4M</b>	<b>+30%</b>
<b><u>Net Worth Less Conserved Land:</u></b>	<b>\$1.96M</b>	<b>\$4.9M</b>	<b>+150%</b>

THE CONSERVATION FUND <i>America's Partner in Conservation</i>		What Happened At HVLТ?	
	HVLТ (2007)	HVLТ (2012)	HVLТ % Change
<b><u>Assets:</u></b>			
Cash	\$1.0M	\$1.1M	+10%
Endowment/Investments	\$900K	\$4.4M	+380%
Conserved Lands	\$16.8M	\$19.5M	+16%
Other Assets	\$147K	\$262K	+78%
<b><u>Total Assets:</u></b>	<b>\$18.8M</b>	<b>\$25.3M</b>	<b>+34%</b>
<b><u>Liabilities:</u></b>	<b>\$106K</b>	<b>\$860K</b>	<b>+700%</b>
<b><u>Net Worth:</u></b>	<b>\$18.7M</b>	<b>\$24.4</b>	<b>+30%</b>
<b><u>Net Worth Less Conserved Land:</u></b>	<b>\$1.96M</b>	<b>\$4.9</b>	<b>+150%</b>

## 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.

## Tool Based or Mission Driven

- ☐ If your land trust is focused on using a fixed set of tools such as easements or fee acquisition, then your measures can reflect that focus.
  - In five years, purchase or obtain conservation easements on 50% of the farms in the Salmon River Valley.
- ☐ A mission driven organization is more broadly concerned and measures can reflect that emphasis.
  - In five years, 50% of the farms in the Salmon River valley have been legally protected from development.

Open Standards, LT ver. 1 p. 14

## Ideas on Measures for Water Quality and Brook Trout

- ☐ Maintain a consistent water temperature of X and creek flow of Y (cubic feet per second).
- ☐ Maintain (or increase) a creek depth of X.
- ☐ Increase tree canopy over the creek by X percent by Y year.
- ☐ Conserve X number of feet creek frontage by Y year.
- ☐ Open or allow fishing access on X number of new site by the year Y.
- ☐ Your ideas!



## References



## Large Landscape Conservation in the Northeast Megaregion



[www.rpa.org/northeastlandscapes/](http://www.rpa.org/northeastlandscapes/)



## Practitioners' Network for Large Landscape Conservation

1. Promote and support large landscape conservation initiatives.
2. Build capacity for large landscape conservation management at various scales and across sectors.
3. Provide support for policy analysis and reform.
4. Link existing and emerging large landscape conservation initiatives for ongoing learning and exchange.

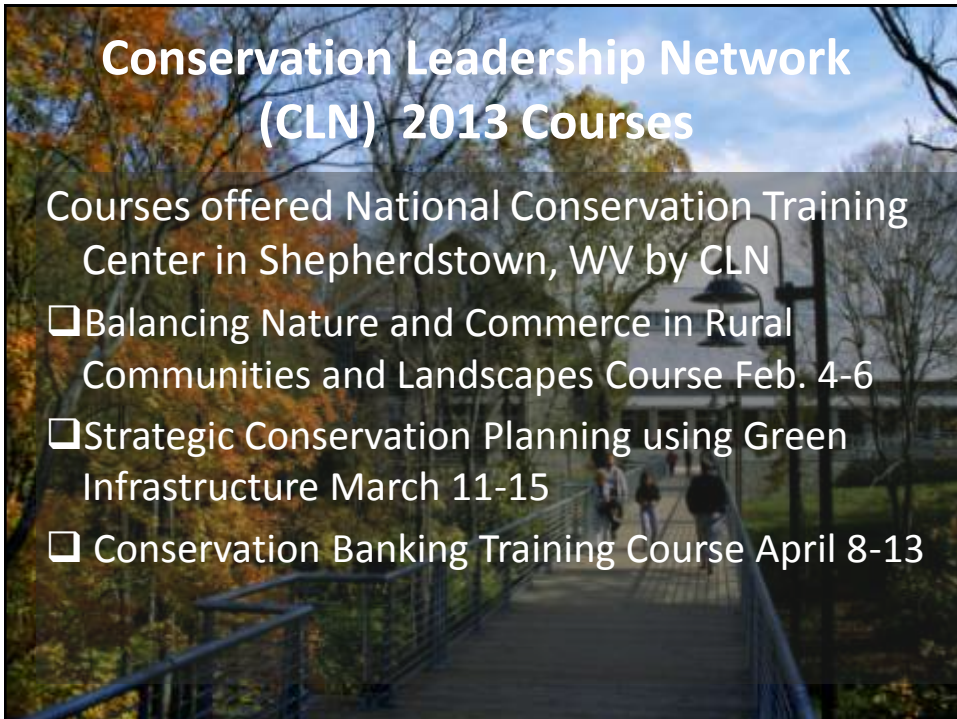
For more information, contact:  
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Center for Natural Resources and  
Environmental Policy  
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[shawn@cnrep.org](mailto:shawn@cnrep.org) or 406-381-2904



## Conservation Leadership Network (CLN) 2013 Courses

Courses offered National Conservation Training Center in Shepherdstown, WV by CLN

- ☐ Balancing Nature and Commerce in Rural Communities and Landscapes Course Feb. 4-6
- ☐ Strategic Conservation Planning using Green Infrastructure March 11-15
- ☐ Conservation Banking Training Course April 8-13





## My Background



### EDUCATION

B.A. Government, Colby College

MCP, Environmental Planning, MIT

### EXPERIENCE

Public Agencies – EPA, NPS, DOE and EOE

Nonprofits – The Conservation Fund, Sudbury Valley Trustees, Consensus Building Institute

Educator/Researcher – Cornell University and Conservation Leadership Network

Consultant – Land Conservation & Planning

### FOR MORE INFORMATION CONTACT:

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