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.

Conservation Planning and Fundraising

*Gentlemen we have run of 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.

<table>
<thead>
<tr>
<th>GEOGRAPHY</th>
<th>STRATEGIC CONSERVATION PLAN</th>
<th>NUMBER OF ORGANIZATIONS</th>
<th>AVERAGE ACRES CONSERVED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entire US</td>
<td>Yes</td>
<td>564</td>
<td>16,051</td>
</tr>
<tr>
<td></td>
<td>No</td>
<td>240</td>
<td>8,203</td>
</tr>
<tr>
<td>Midwest</td>
<td>Yes</td>
<td>98</td>
<td>7,210</td>
</tr>
<tr>
<td></td>
<td>No</td>
<td>42</td>
<td>2,965</td>
</tr>
<tr>
<td>Northeast</td>
<td>Yes</td>
<td>258</td>
<td>9,122</td>
</tr>
<tr>
<td></td>
<td>No</td>
<td>110</td>
<td>7,532</td>
</tr>
<tr>
<td>Northwest</td>
<td>Yes</td>
<td>51</td>
<td>39,260</td>
</tr>
<tr>
<td></td>
<td>No</td>
<td>14</td>
<td>5,595</td>
</tr>
<tr>
<td>Pacific</td>
<td>Yes</td>
<td>63</td>
<td>22,020</td>
</tr>
<tr>
<td></td>
<td>No</td>
<td>12</td>
<td>5,762</td>
</tr>
<tr>
<td>Southeast</td>
<td>Yes</td>
<td>83</td>
<td>20,000</td>
</tr>
<tr>
<td></td>
<td>No</td>
<td>29</td>
<td>8,228</td>
</tr>
<tr>
<td>Southwest</td>
<td>Yes</td>
<td>34</td>
<td>37,143</td>
</tr>
<tr>
<td></td>
<td>No</td>
<td>27</td>
<td>19,407</td>
</tr>
</tbody>
</table>

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

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!
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-country 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


Strategic Conservation Planning and Engagement Part 2
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
The Planning Process

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

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
- Rejected Projects

Strategic Land Conservation Decision Making

- Proactive Landowner Projects
- Opportunistic Projects
- Crisis Projects

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 Capacity

Declined Projects or projects referred to more appropriate groups
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
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

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

Research by the Sustaining Family Forests Initiative  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 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”

A Snap Shot of Conservation Finance Tools*

<table>
<thead>
<tr>
<th>Philanthropic Capital</th>
<th>Private Capital</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Traditional Sources</td>
<td>✓ Compensatory Payments</td>
</tr>
<tr>
<td>✓ Individual Donors</td>
<td>✓ Habitat &amp; Species Mitigation/Banking</td>
</tr>
<tr>
<td>✓ Foundations</td>
<td>✓ Function Trading (Nutrient, Carbon)</td>
</tr>
<tr>
<td>✓ Businesses and Corporations</td>
<td>✓ Nature Resource Damage (Other Env. Settlement)</td>
</tr>
<tr>
<td>✓ Individual, Corp. &amp; Nonprofit Partners</td>
<td>✓ Federal Power Act</td>
</tr>
<tr>
<td>✓ Voluntary Surcharges</td>
<td>✓ Conservation Development</td>
</tr>
<tr>
<td>✓ Voluntary Private Transfer Fees</td>
<td>✓ Income from Conservation Land</td>
</tr>
<tr>
<td>✓ Trade Lands</td>
<td>✓ Fee for Services</td>
</tr>
<tr>
<td>✓ Donor-advised Funds and &amp; Aggregators</td>
<td>✓ Conservation Investors</td>
</tr>
<tr>
<td>✓ Web and Phone applications</td>
<td>✓ Conservation Investment Notes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tax Benefits</th>
<th>Financing</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Federal/State Tax Deductions</td>
<td>✓ Philanthropic</td>
</tr>
<tr>
<td>✓ New Market Tax Credits</td>
<td>✓ External Revolving Loan Funds</td>
</tr>
<tr>
<td>✓ State Transferable &amp; non trans. tax credits</td>
<td>✓ Internal Protection Funds</td>
</tr>
<tr>
<td>✓ State/local Bond Measures</td>
<td>✓ Foundations (PRIs)</td>
</tr>
<tr>
<td>✓ State/local Conservation Programs</td>
<td>✓ Conservation Lenders &amp; Guarantors</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Public Capital</th>
<th>Private</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Fed. Conservation Programs (LWCF etc)</td>
<td>✓ Commercial Bank Lending</td>
</tr>
<tr>
<td>✓ Special Fed/State Designation</td>
<td>✓ Farm Credit Landing</td>
</tr>
<tr>
<td>✓ State/local Bond Measures</td>
<td>✓ Seller Financing</td>
</tr>
<tr>
<td>✓ State/local Conservation Programs</td>
<td>✓ Public</td>
</tr>
</tbody>
</table>

*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…

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Endowment/Investment</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Conserved Lands</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Other Assets</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td><strong>Total Assets:</strong></td>
<td><strong>$0</strong></td>
<td><strong>$0</strong></td>
<td><strong>$0</strong></td>
</tr>
<tr>
<td>Liabilities:</td>
<td><strong>$0</strong></td>
<td><strong>$0</strong></td>
<td><strong>$0</strong></td>
</tr>
<tr>
<td><strong>Net Worth:</strong></td>
<td><strong>$0</strong></td>
<td><strong>$0</strong></td>
<td><strong>$0</strong></td>
</tr>
<tr>
<td><strong>Net Worth Less Protected Land:</strong></td>
<td><strong>$0</strong></td>
<td><strong>$0</strong></td>
<td><strong>$0</strong></td>
</tr>
</tbody>
</table>
### Progression of TNC

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assets:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash</td>
<td>$54.8M</td>
<td>$73M</td>
<td>+33%</td>
</tr>
<tr>
<td>Endowment/Investments</td>
<td>$2.1B</td>
<td>$1.9B</td>
<td>-16%</td>
</tr>
<tr>
<td>Conserved Lands</td>
<td>$3.0B</td>
<td>$3.7B</td>
<td>+23%</td>
</tr>
<tr>
<td>Other Assets</td>
<td>$245M</td>
<td>$398M</td>
<td>+62%</td>
</tr>
<tr>
<td><strong>Total Assets:</strong></td>
<td>$5.4B</td>
<td>$6B</td>
<td>+11%</td>
</tr>
<tr>
<td><strong>Liabilities:</strong></td>
<td>$688M</td>
<td>$785M</td>
<td>+14%</td>
</tr>
<tr>
<td><strong>Net Worth:</strong></td>
<td>$4.7B</td>
<td>$5.2B</td>
<td>+11%</td>
</tr>
<tr>
<td><strong>Net Worth Less Conserved Land:</strong></td>
<td>$1.7B</td>
<td>$1.5B</td>
<td>-11%</td>
</tr>
</tbody>
</table>

### Progression of UVLT

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assets:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash</td>
<td>$46K</td>
<td>$60K</td>
<td>+30%</td>
</tr>
<tr>
<td>Endowment/Investments</td>
<td>$0</td>
<td>$0</td>
<td>+0%</td>
</tr>
<tr>
<td>Conserved Lands</td>
<td>$1.9M</td>
<td>$2.5</td>
<td>+31%</td>
</tr>
<tr>
<td>Other Assets</td>
<td>$167K</td>
<td>$225K</td>
<td>+34%</td>
</tr>
<tr>
<td><strong>Total Assets:</strong></td>
<td>$2.2M</td>
<td>$2.8M</td>
<td>+27%</td>
</tr>
<tr>
<td><strong>Liabilities:</strong></td>
<td>$165K</td>
<td>$1.2M</td>
<td>+727%</td>
</tr>
<tr>
<td><strong>Net Worth:</strong></td>
<td>$2M</td>
<td>$1.6</td>
<td>-20%</td>
</tr>
<tr>
<td><strong>Net Worth Less Conserved Land:</strong></td>
<td>$100K</td>
<td>($900K)</td>
<td>-1000%</td>
</tr>
</tbody>
</table>
### Progression of HVLT

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assets:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash</td>
<td>$1.0M</td>
<td>$1.1M</td>
</tr>
<tr>
<td>Endowment/Investments</td>
<td>$900K</td>
<td>$4.4M</td>
</tr>
<tr>
<td>Conserved Lands</td>
<td>$16.8M</td>
<td>$19.5M</td>
</tr>
<tr>
<td>Other Assets</td>
<td>$147K</td>
<td>$262K</td>
</tr>
<tr>
<td><strong>Total Assets:</strong></td>
<td>$18.8M</td>
<td>$25.3M</td>
</tr>
<tr>
<td><strong>Liabilities:</strong></td>
<td>$106K</td>
<td>$860K</td>
</tr>
<tr>
<td><strong>Net Worth:</strong></td>
<td>$18.7M</td>
<td>$24.4M</td>
</tr>
<tr>
<td><strong>Net Worth Less Conserved Land:</strong></td>
<td>$1.96M</td>
<td>$4.9M</td>
</tr>
</tbody>
</table>

### What Happened At HVLT?

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assets:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash</td>
<td>$1.0M</td>
<td>$1.1M</td>
</tr>
<tr>
<td>Endowment/Investments</td>
<td>$900K</td>
<td>$4.4M</td>
</tr>
<tr>
<td>Conserved Lands</td>
<td>$16.8M</td>
<td>$19.5M</td>
</tr>
<tr>
<td>Other Assets</td>
<td>$147K</td>
<td>$262K</td>
</tr>
<tr>
<td><strong>Total Assets:</strong></td>
<td>$18.8M</td>
<td>$25.3M</td>
</tr>
<tr>
<td><strong>Liabilities:</strong></td>
<td>$106K</td>
<td>$860K</td>
</tr>
<tr>
<td><strong>Net Worth:</strong></td>
<td>$18.7M</td>
<td>$24.4M</td>
</tr>
<tr>
<td><strong>Net Worth Less Conserved Land:</strong></td>
<td>$1.96M</td>
<td>$4.9M</td>
</tr>
</tbody>
</table>
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.

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!
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) – aiming for quality
- How many projects within your focus areas are you doing vs. how many projects outside of your focus areas (pro-active vs. opportunist projects)
References

Large Landscape Conservation in the Northeast Megaregion

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:
Shawn Johnson
Center for Natural Resources and Environmental Policy
The University of Montana
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:
Ole Amundsen III, oamundsen@earthlink.org
Phone 607-277-0999