

## LAND TRUST ALLIANCE RALLY 2006 - NASHVILLE

### WI Land Trusts Attending:

- ◆ Caledonia Conservancy
- ◆ Geneva Lake Conservancy
- ◆ Glacial Lakes Conservancy
- ◆ LandKeepers
- ◆ Lauderdale Lakes Conservancy
- ◆ Mississippi Valley Conservancy
- ◆ Northeast Wisconsin Land Trust
- ◆ River Revitalization Foundation
- ◆ Tall Pines Conservancy
- ◆ Urban Open Space Foundation

### *LTA's Standards & Practices Core Curriculum:*

LTA has just released the updated version of the Standards and Practices Guidebook. Gathering Waters has ordered two copies of the new version, which comprises two volumes, and will make one copy available for borrowing by member land trusts.

The first course in LTA's Core Curriculum is complete, "Avoiding Conflicts of Interest and Running an Ethical Land Trust". The course has gone through the pilot phase and is now available to land trusts and service centers to lead as a workshop.

LTA is in the process of developing an online learning center where all the Core Curriculum courses will be available, as well as a host of other resources relating to Standards & Practices and land trust work. LTA members will be able to take courses as real-time online seminars, or as self-led programs. Below is a list of all the planned courses, with targeted dates for piloting. If you are interested in working with Gathering Waters to bring any of these courses to your land trust, contact Karen Bassler at 608-251-9131.

Course Topic	Practices Covered*	Course Hours†
<b>Pilot Testing: Spring 2006*</b>		
<b>Avoiding Conflicts of Interest and Running an Ethical Land Trust</b>	1D, 4A, 4C	4.5
<b>Pilot Testing: Fall 2006</b>		
<b>Smart Stewardship: Determining Costs and Raising and Managing Dedicated Funds</b>	6F, 11A, 12A	6
<b>Successful Planning, Selection, and Evaluation of</b>	8B, 8D, 8E, 8G	10.5

<b>Conservation Projects</b>		
<b>How to Comply with Non-Profit Law and Create Sound Records</b>	2A, 2B, 2C, 2D, 6B, 9G	9
<b>Building Strong Boards and Making Them Successful</b>	2B, 3B, 3C, 3F	6
<b>Tax Benefits and Appraisals for Conservationists</b>	10A, 10B	6
<b>Pilot Testing Spring 2007</b>		
<b>Conservation Easement Drafting and Documentation: The Keys to Long-term Success</b>	8G, 9E, 11B	9
<b>What to Do, Now that You Have It: Conservation Easement Stewardship</b>	11D, 11B, 11C	7.5
<b>How to Successfully Steward Fee Lands</b>	8G, 12C, 12D, 12E	9
<b>Pilot Testing: Summer 2007</b>		
<b>Your Future: Mission, Planning, and Capacity</b>	1A, 1B, 7A	4.5
<b>How to Acquire Land and Conservation Easements</b>	9A, 9G, 9H, 9J	6
<b>Pilot Testing Fall 2007</b>		
<b>Long-Term Conservation Easement Management</b>	9G, 11E, 11I	12
<b>Financial Management</b>	6A, 6B, 6D	6
<b>Fundraising Fundamentals</b>	5A, 5B	6
<b>Selling and Transferring Land and Conservation Easements</b>	4C, 9K, 9L	6

\*The numbers in the course descriptions correspond to the practices from *Land Trust Standards and Practices* that will be covered in the training. **Pilot testing** means that LTA or a partner will present the course at a conference(s) and evaluate it. Self-study and online materials will be available after revisions are made to the course.

*Federal Tax Policy:*

LTA has developed a media tool kit about the new federal tax incentives, available on their website. This includes a postcard which can be sent to various constituencies with an overview of the new incentives and referrals for more information.

As LTA develops their strategy for extending these incentives beyond the end of 2007, they will need help from land trusts. LTA will collect stories, newspaper articles, television shows and other evidence of the positive impact of the incentives. If you work with a landowner who will be taking advantage of the new incentives, and have outreach materials regarding that project, please share them with Russ Shay at LTA: [rshay@lta.org](mailto:rshay@lta.org).

The new incentives require that all appraisals done for tax deduction purposes be completed by qualified general appraisers. These qualified appraisers must have a designation from a recognized national appraisers organization. The National Association of Master Appraisers will give a designation to any appraiser who has a certified general state license. Gathering Waters has the most current list of certified general appraisers licensed to work in Wisconsin, as well as the most recent list of members in the Appraisal Institute.

*Land Trust Accreditation:*

Specific requirements for eligibility to apply for accreditation are being developed by the Accreditation Commission. These include:

- ◆ 501(c ) (3) status
- ◆ Two years since incorporation
- ◆ Completed at least 2 direct land acquisition or conservation easement projects (land trust in the chain of title or recipient of easement)
- ◆ Adoption of Standards & Practices
- ◆ Completed an organizational assessment within 2 years of applying

The draft application is out on the Accreditation Commission website, and there is an online survey for comments. Part of the application is a Public Notice requirement – the applicant land trust must inform its stakeholders that it is applying for accreditation and inform them how they can provide comments to the Commission. The Commission also will post the names of organizations that have submitted applications on their website.

There is also an online application to participate in the 2007 pilot phase of the program. The Commission would like 50 pilot applicants, and will select applicants randomly, but to fill certain organizational parameters equally (volunteer v. staffed, geographic scale, age, number of projects). If you are interested in participating in the pilot phase, please fill out the brief form on the website: [www.lta.org/accreditation/pilot.htm](http://www.lta.org/accreditation/pilot.htm) Be warned that the pilot phase will be more time-consuming than later application periods, and your application results will not be announced until the end of 2008.

*Highlights:*

\* LTA announced the development of the Kingsbury Browne Conservation Leadership Award, named in honor of one of the founders of LTA. The Award includes a Fellowship with the Lincoln Institute for Land Policy. The first recipient of the Award is Darby Bradley, President of the Vermont Land Trust.

\* Jane Anderson (independent consultant) and Chris West (Colorado Cattlemen's Agricultural Land Trust) gave an excellent, two-part seminar on "Determining Easement Stewardship Costs and Raising & Managing Dedicated Funds." The three take-away points from that seminar were:  
1) Easement monitoring costs are only a fraction of the total costs to your conservation easement program. They identified four categories of easement stewardship costs:

- a) **one time costs** – creating baseline documentation, recording easement, educating new landowners about easement restrictions
- b) **annual costs** – monitoring, landowner communication, volunteer/staff time
- c) **programmatic costs** – training volunteers and/or staff, establishing and reviewing procedures and policies regarding conservation easement program, hiring staff
- d) **special circumstances** – ecological disasters, research projects, violations

2) The second key point was that in analyzing conservation easement programs among land trusts, they found that having 90 -100 easements represented a "tipping point" for organizations, at which time they found it necessary to hire one full-time employee to manage their easements.  
3) Finally, you should tally your total number of easements not just by those you hold today, but include any allowable subdivisions of properties with easements. Once those subdivision rights are exercised, your organization will have double or more the number of easements to monitor and defend.