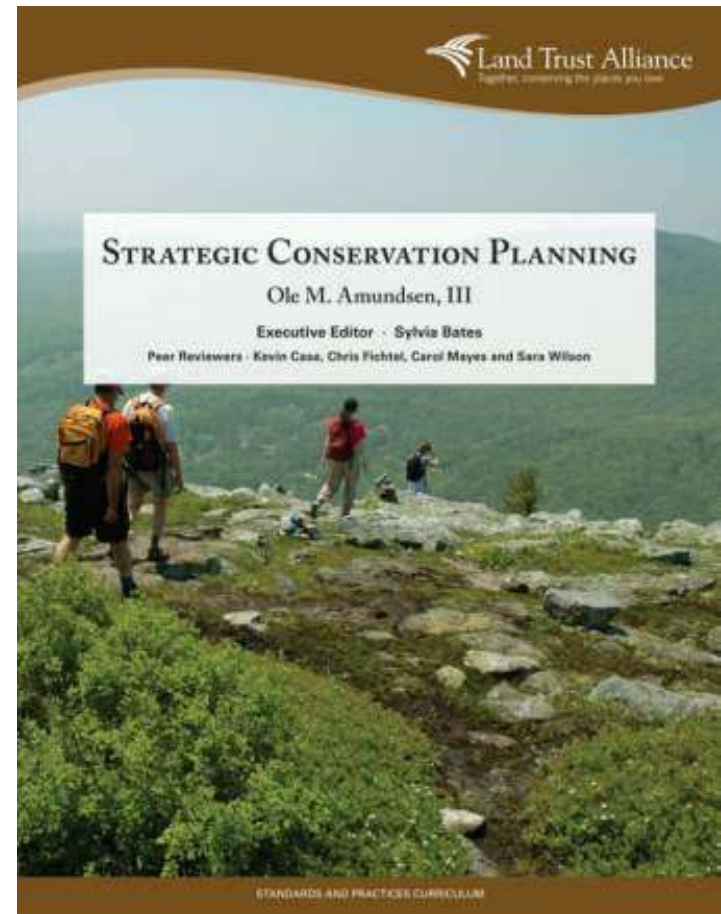


Strategic Conservation Planning

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

The Planning Process



- ❖ Step 1: Get Started
- ❖ Step 2: Understand Your Community
- ❖ Step 3: Set Priorities
- ❖ Step 4: Implement your plan

Step 1.

Getting Started

☐ Prerequisites

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

☐ Set Expectations & Establish Goals

☐ Determine Leadership & Level of Public Engagement

☐ 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.

Step 2.

Understanding Your Community

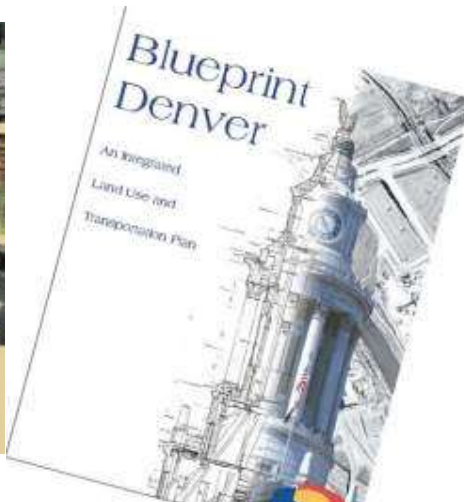
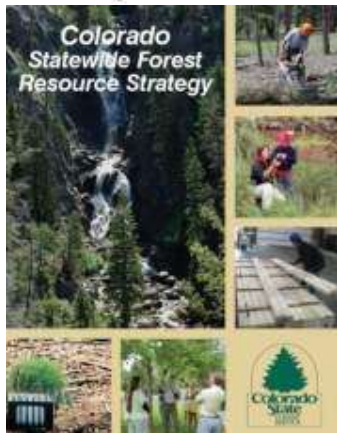
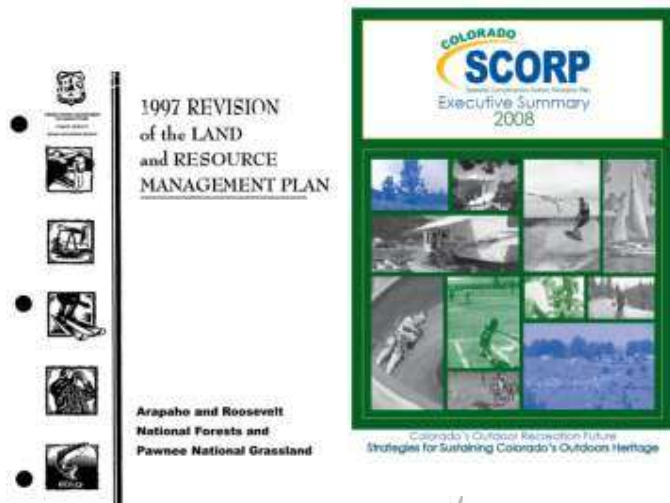
☐ Identify and Gather Information

- Inspirational Information
- Technical & Reference Information
- Mapping Information
- Resource Inventories

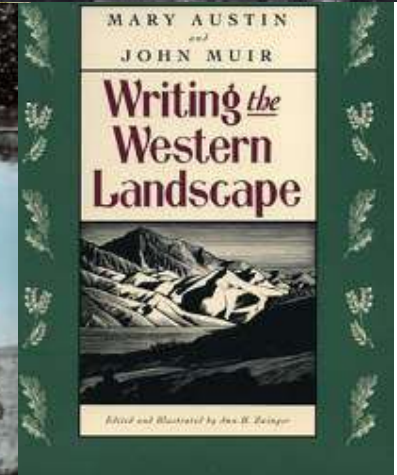
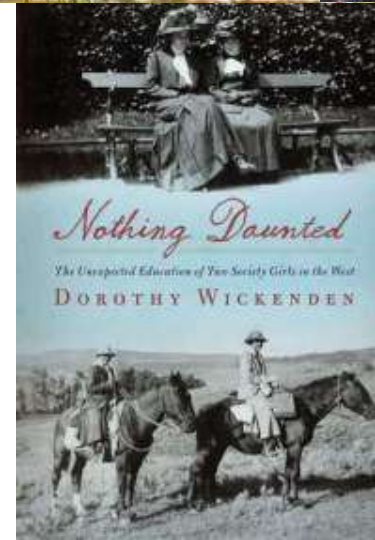
☐ Analyze Information

- Explore Local History and Demographics Trends
- Create a Map of Conserved Land
- Use Resource Inventories
- Assess Threats to Resources

Technical Information



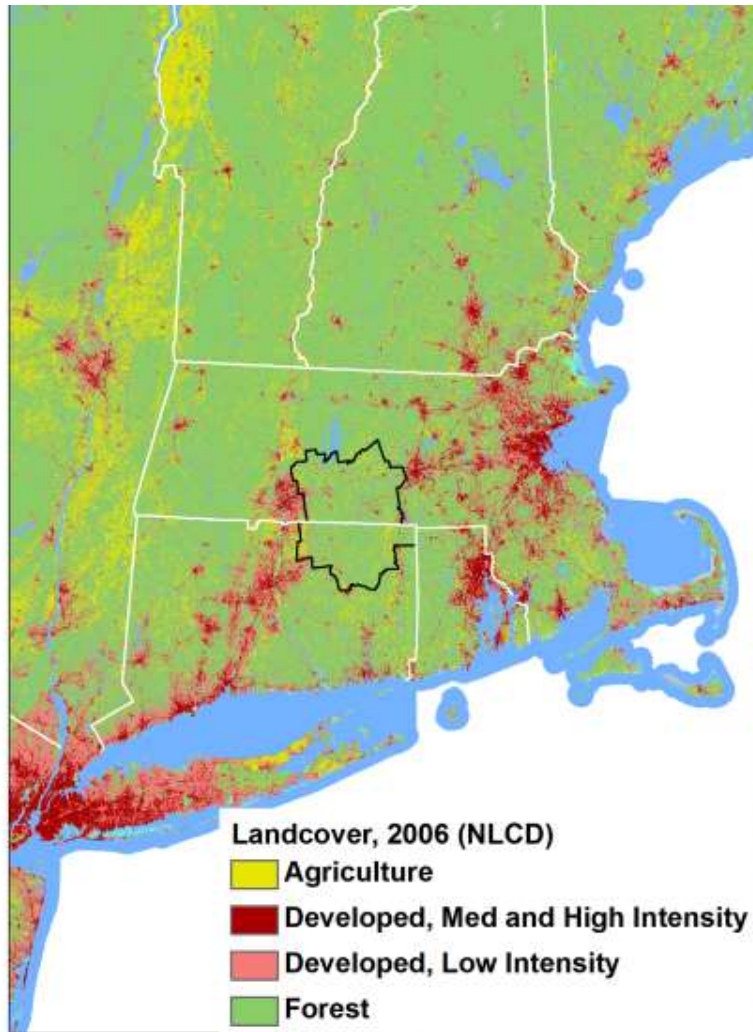
Inspirational Information



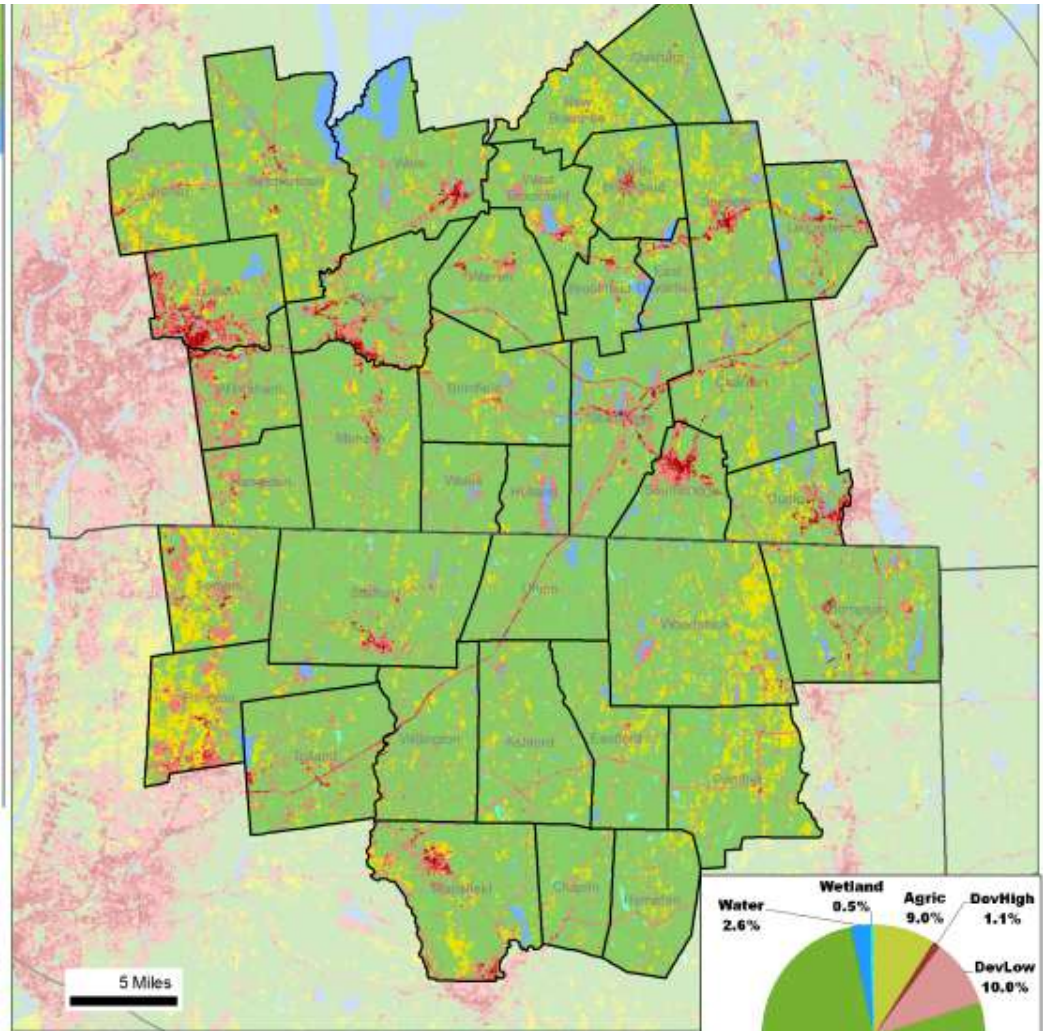
Building and Using Natural Resource Inventories:

Massachusetts – Connecticut Sustainable Forestry Partnership

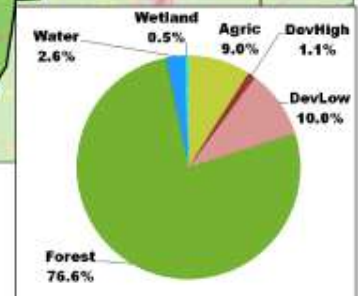
Special Thanks to Brian Hall at Harvard Forest!



Landcover, 2006 (NLCD)



Brian Hall, Harvard Forest; bhall@fas.harvard.edu; 978-756-6154; Date Saved: 10/1/2012; NLCD LULC.mxd

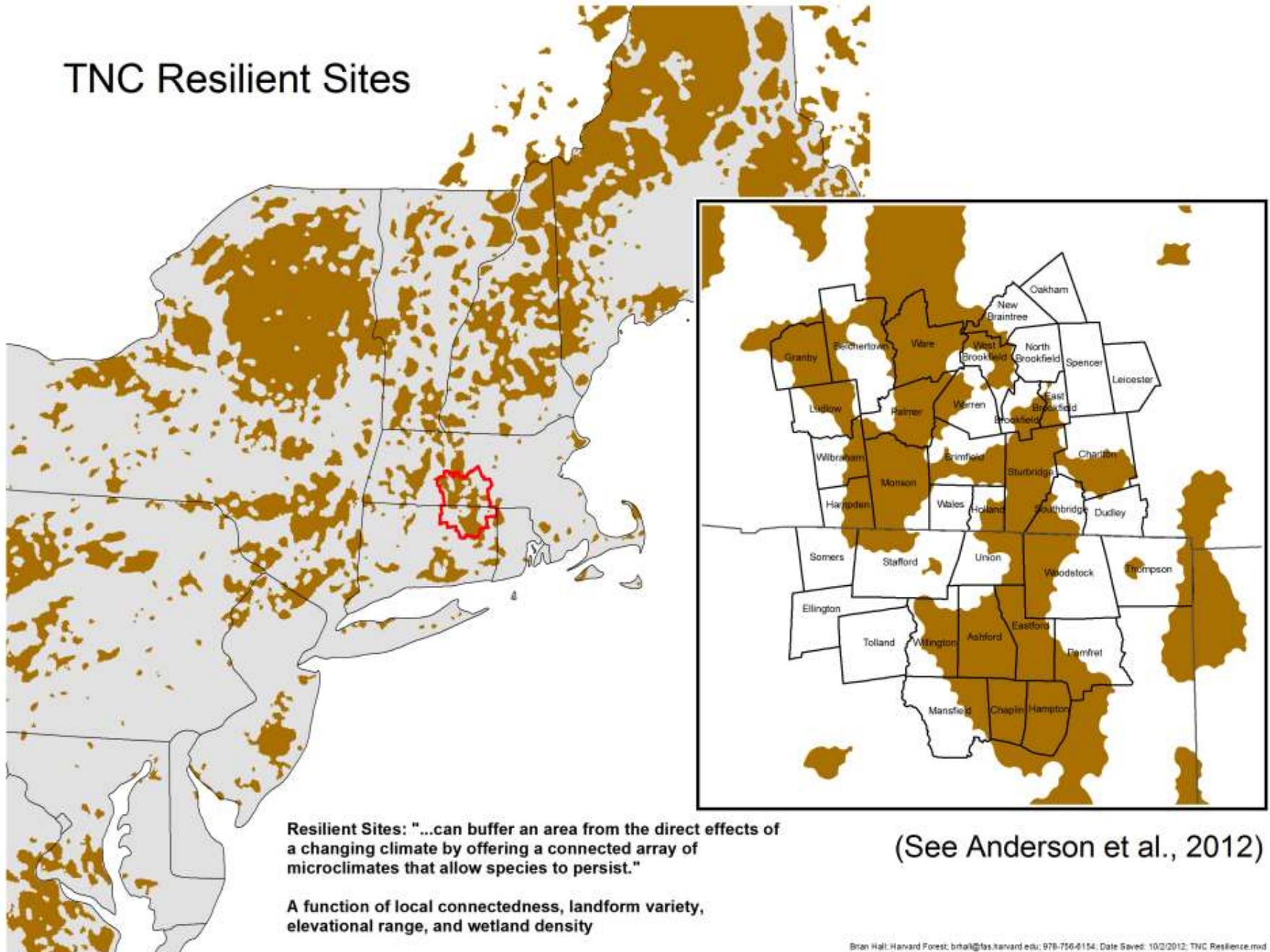


Assessing Resource Threats

- ❖ 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 your organization?

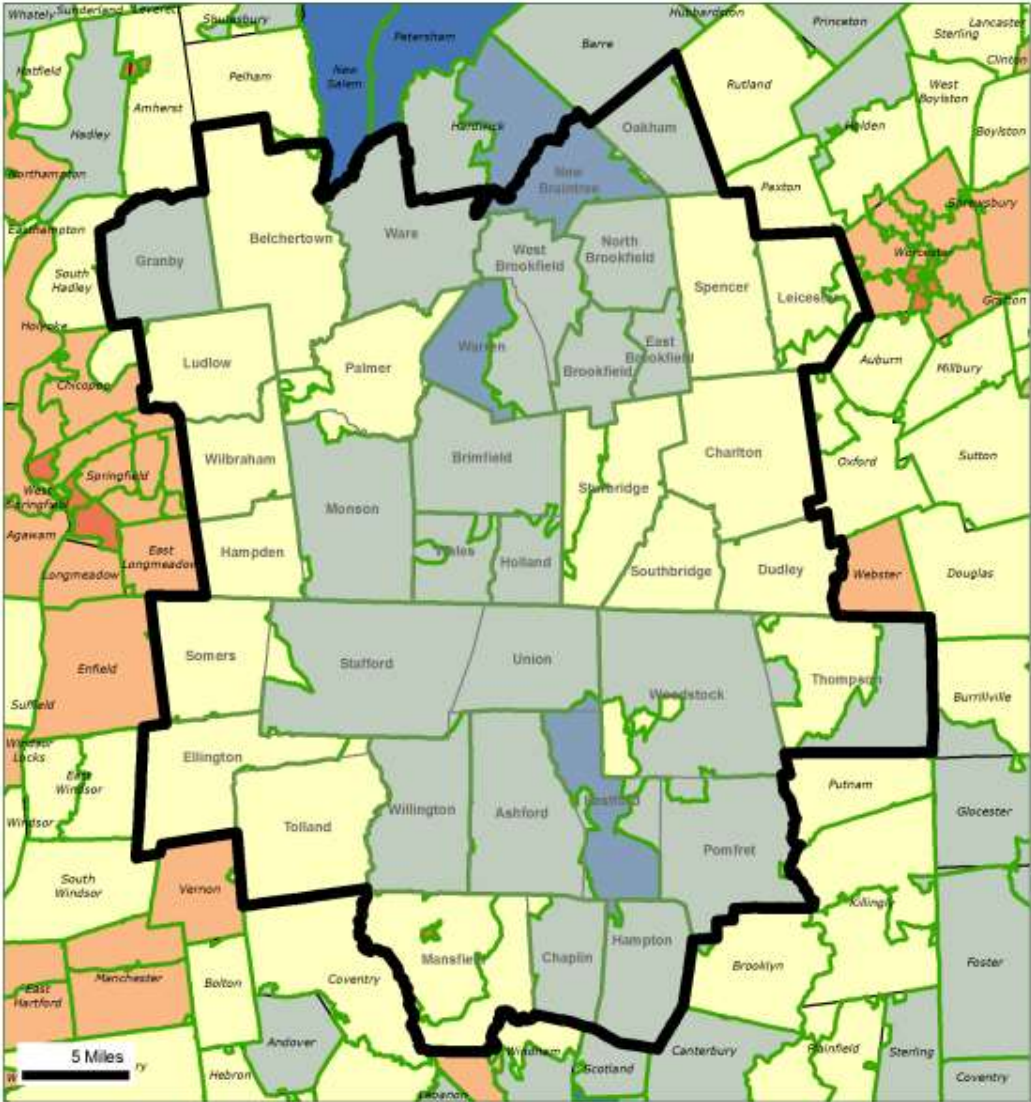
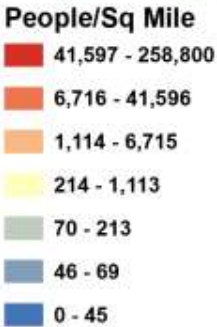
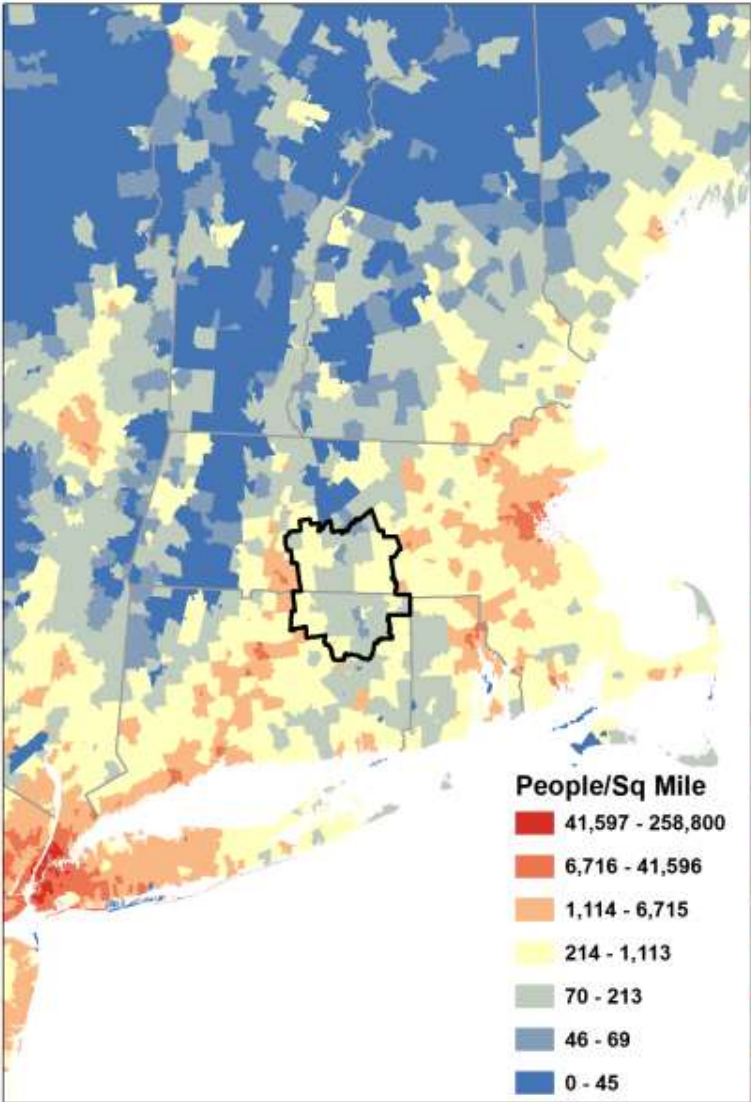
Climate Change: MassConn Sustainable Forestry Partnership

TNC Resilient Sites



Massachusetts – Connecticut Sustainable Forestry Partnership

Population Density (2010)



Data from US Census and compiled by ESRI. Unit is zipcode.

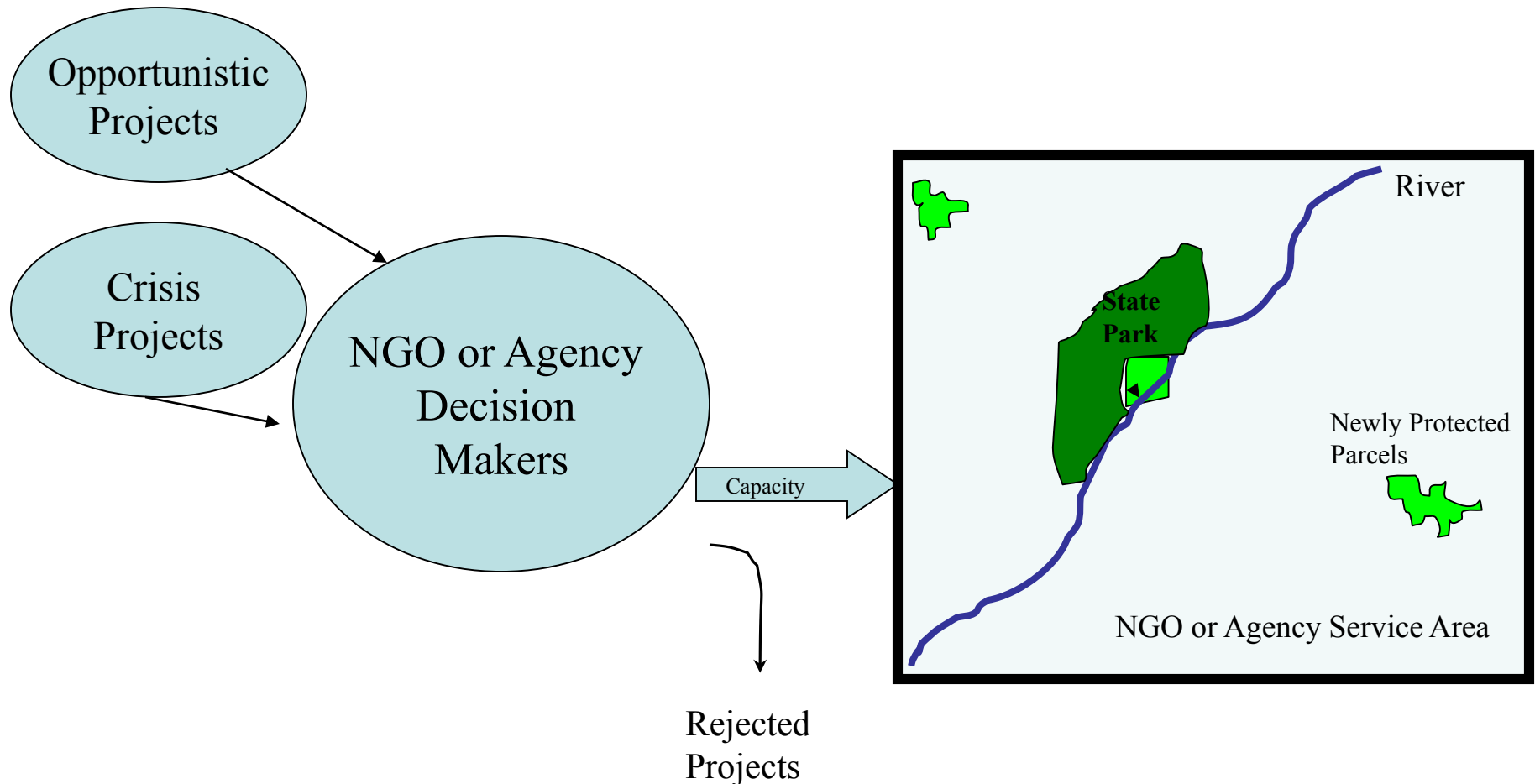
Brian Hall, Harvard Forest; bhall@fas.harvard.edu; 978-756-6154; Date Saved: 10/1/2012; Population Density.mxd

Step 3.

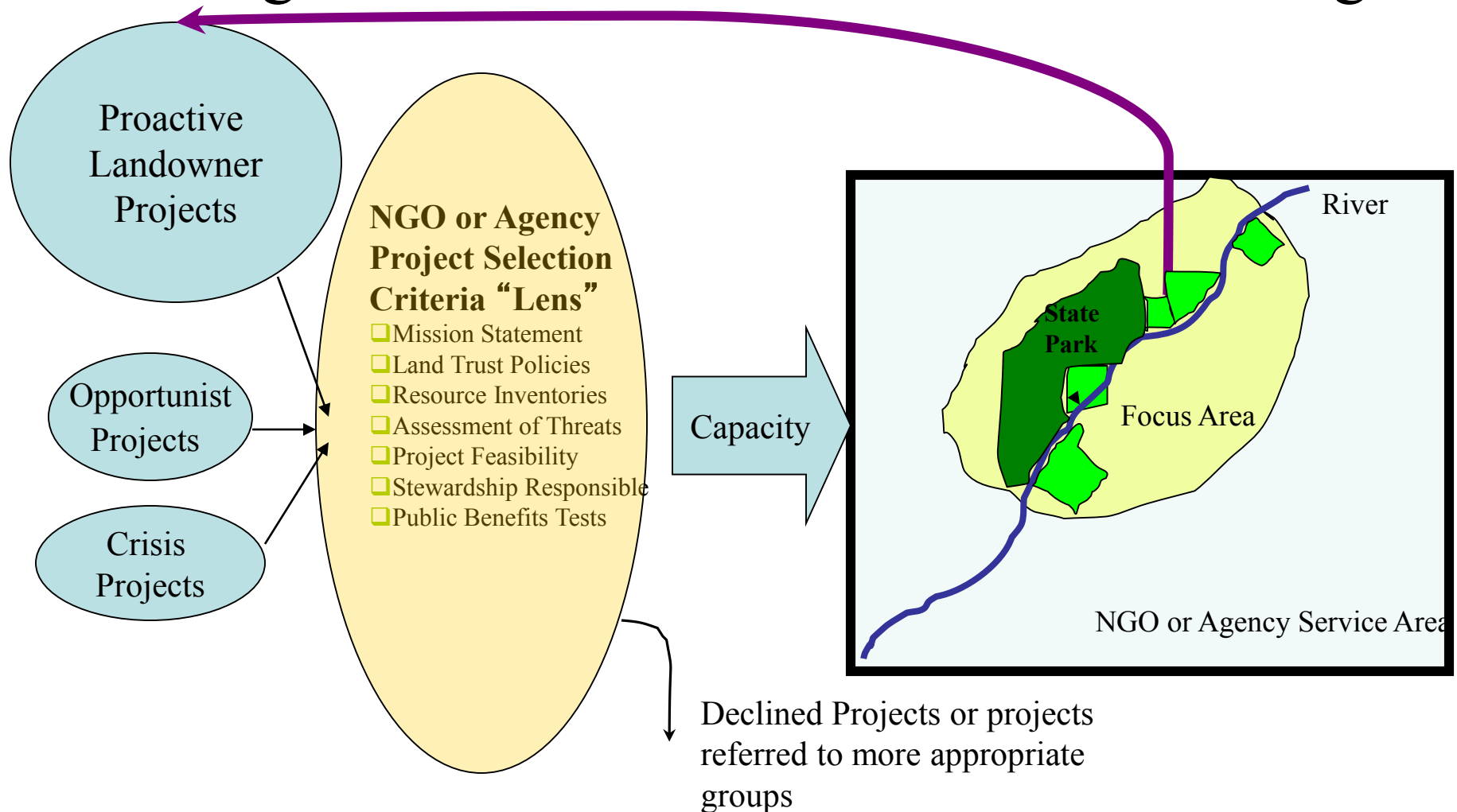
Setting Priorities

- ❑ Project Selection Criteria
- ❑ Focus Areas
 - Maps, Magic Markers, Minds (non GIS)
 - Overlay Analysis (both non GIS & GIS)
 - Suitability Analysis (advanced GIS)
 - Green Print (TPL advanced GIS)
 - Green Infrastructure (TCF advanced GIS)
- ❑ Conduct Landowner Analysis within Focus Areas
- ❑ Use and link Mission Statement with Prioritization Methods

Opportunistic Decision Making



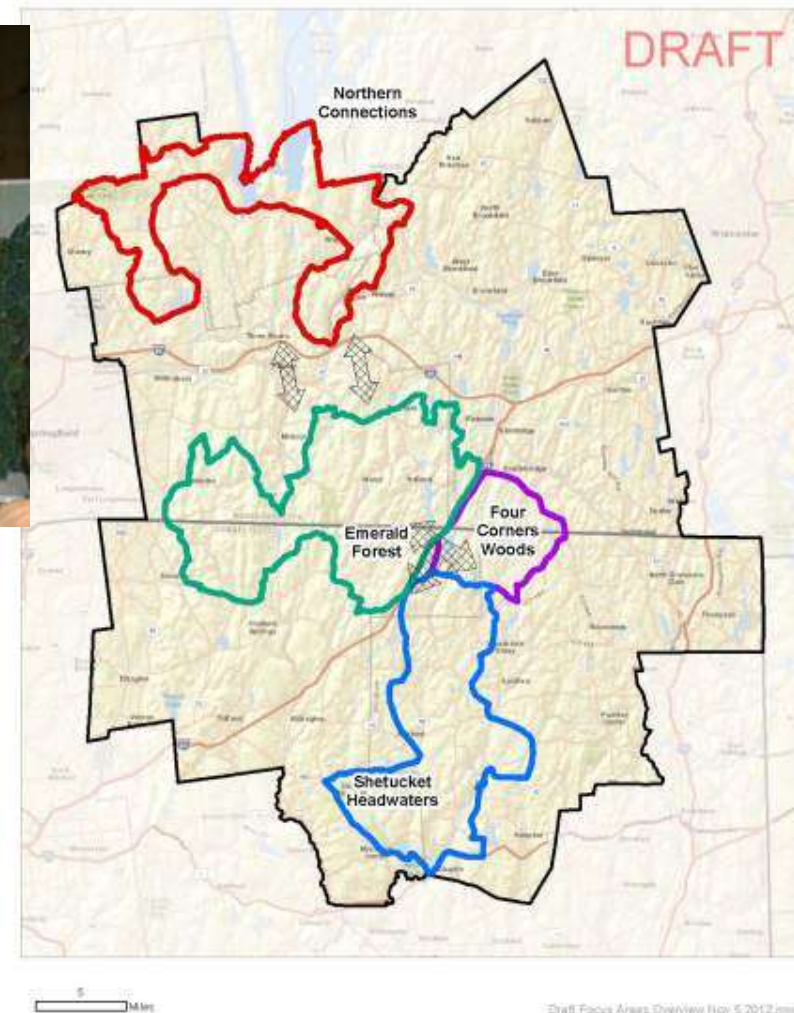
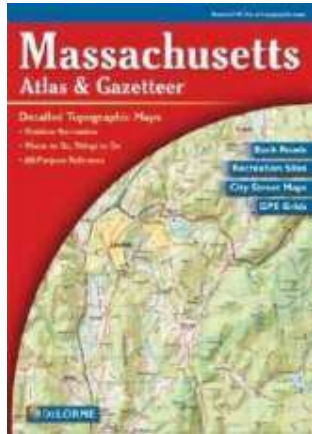
Strategic Land Conservation Decision Making



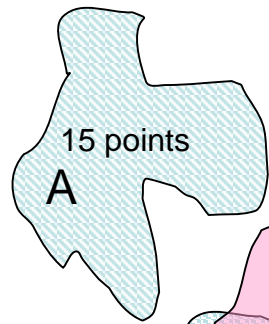
Site Scale Setting Priorities: Project Selection Criteria

- ❑ Recommended Elements of Project Selection Criteria:
 - ❑ Connected to Mission Statement
 - ❑ Examines Public Benefits (IRS Rules for Easements) (
 - ❑ 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.

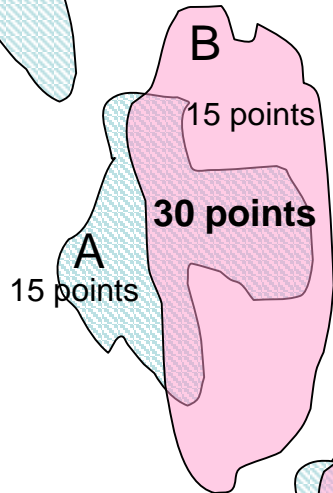
Maps, Magic Markers, Minds (NonGIS)



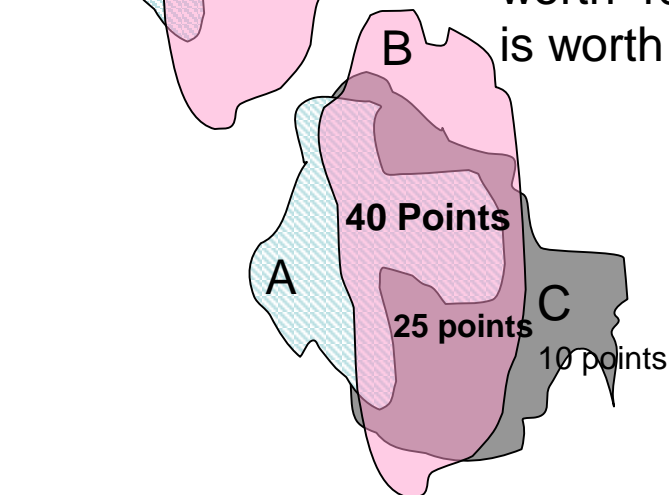
GIS Based Suitability Model



Step 1. Add map layer **A** : one map layer represents a rare habitat area and is weighted at 15 points by the land trust.

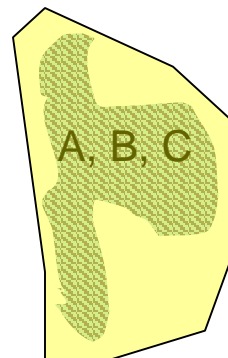


Step 2. Add map layer **B**: represents a mountain ridge and is weighted at 15 points by the land trust. The area that **A** & **B** have in common is worth 30 points.



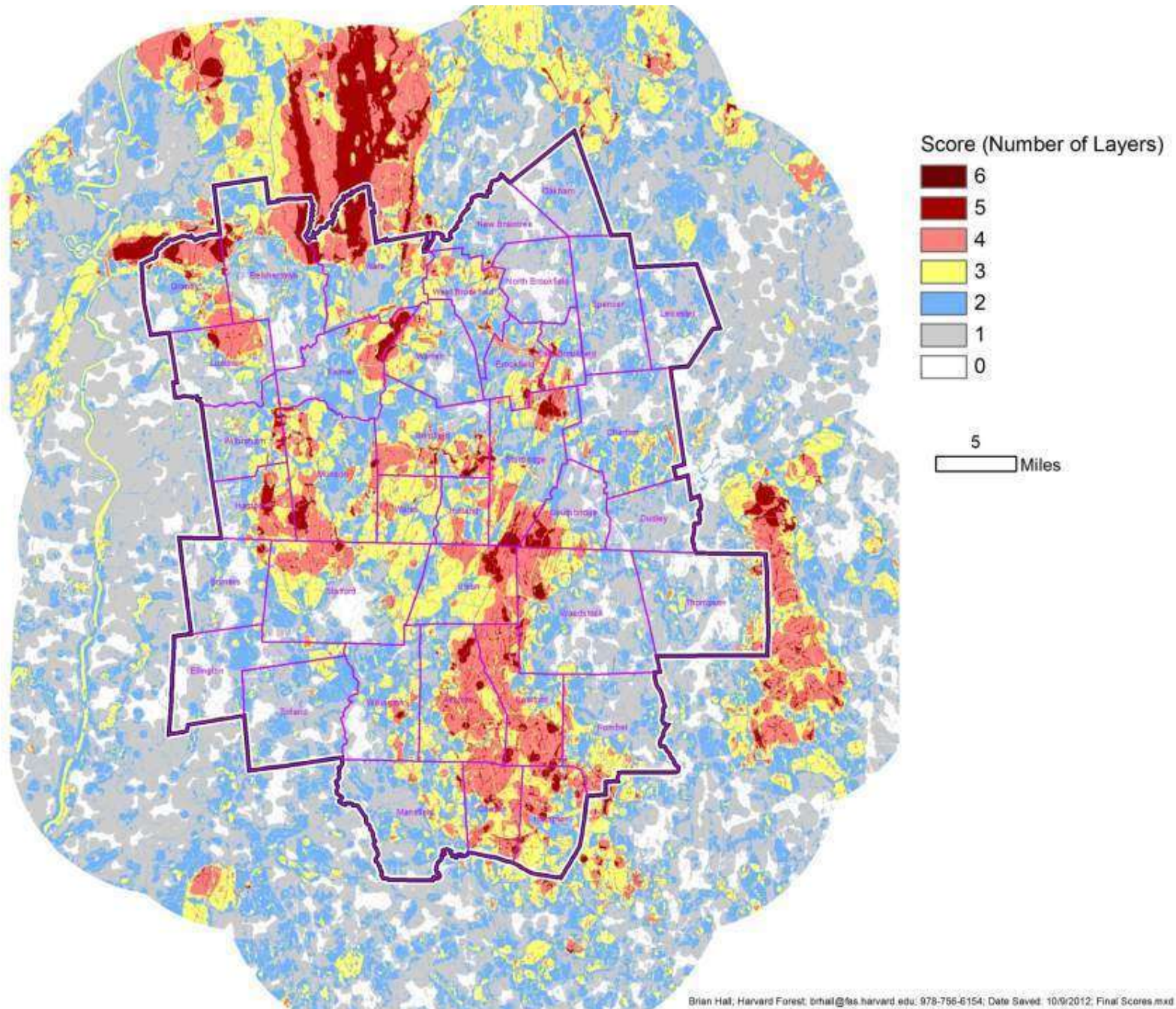
Step 3. Add map layer **C** showing a scenic viewshed worth 10 points. The overlapping area of **A**, **B**, **C** is worth 40 points. The overlapping area of **B** and **C** is worth 25 points.

Step 4. Display only the highest weighted area, which is the area **A**, **B** and **C** have in common.

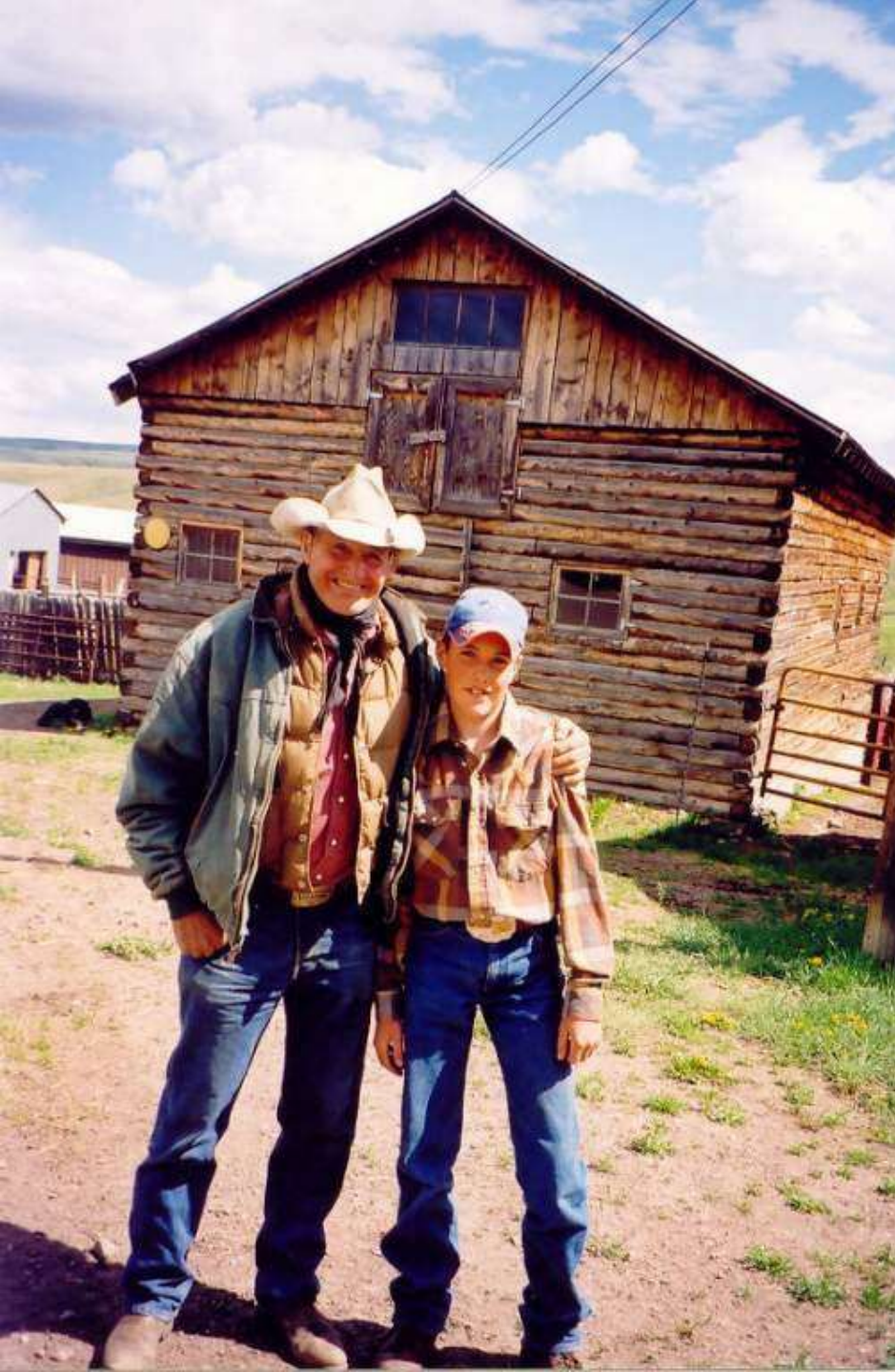


Step 5. Draw Focus Area (in yellow) around the overlapping resource areas. Include an appropriate buffer area for protecting the resources, including overlaps of lesser areas (**B**&**C**).

Massachusetts – Connecticut Sustainable Forestry Partnership



Landowner Analysis and Outreach Begins Here!



- ❖ Look patterns
- ❖ What types of landowners are in your focus areas?
- ❖ For private individuals – who should make the first call or introduction?
- ❖ What's your approach to institutional landowners – like TIMOs, Colleges, Boy Scout Camps??

Step 4. Implementation

☐ Assessing Conservation Capacity

- Do you have the staff, volunteers, funding and other resources to carry out your vision?
- How many projects can the your organization process in a given year?
- How many years would it take at that pace to conserve the necessary land within the focus areas?
- Consider role of partners and collaboration

☐ Measuring Success

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

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 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.