



Excellence · Trust · Permanence

The Commission awards the accreditation seal to land conservation organizations that meet national standards for excellence, uphold the public trust and ensure that conservation efforts are permanent.

Guidance Document

Indicator Practices 11A. Funding Easement Stewardship and 12A. Funding Land Stewardship

The Land Trust Accreditation Commission occasionally publishes Guidance Documents to clarify how the Commission will evaluate a land trust's compliance with indicator practices drawn from Land Trust Standards and Practices. These documents may be amended from time to time. Guidance Documents are intended to complement information provided by the Land Trust Alliance on how to implement the practices that can be found at <http://learningcenter.lta.org>.

Elements of the Practices

The Land Trust Accreditation Commission will evaluate applicant land trusts to see if they are meeting each of the elements of these practices.

- The applicant has evidence that it determines the stewardship, enforcement and other long-term expenses of each fee and easement transaction.
- The applicant has a dedicated fund or funds to help cover long-term stewardship and enforcement costs.
- If the applicant has not secured the funds it needs, it has at least the minimum recommended funding, a plan to secure additional funds, and a policy committing the funds to this purpose (see more next page).

Determining Stewardship and Enforcement Funds

Each applicant must provide evidence that it determines the stewardship, enforcement and other long-term expenses of each fee and easement transaction. Money is generally placed in a dedicated fund or funds to help ensure that the land trust can fulfill its stewardship and enforcement obligations. The amount a land trust should secure depends on many variables; guidance on how to determine the appropriate amount is available from the Land Trust Alliance (see next page).

Indicator Practice 11A. Funding Easement Stewardship

The land trust determines the long-term stewardship and enforcement expenses of each easement transaction and secures the dedicated or operating funds to cover current and future expenses. If funds are not secured at or before the completion of the transaction, the land trust has a plan to secure these funds and has a policy committing the funds to this purpose. *(Also see practice 11E. Enforcement of Easements.)*

Indicator Practice 12A. Funding Land Stewardship

The land trust determines the immediate and long-term financial and management implications of each land transaction and secures the dedicated and/or operating funds needed to manage the property, including funds for liability insurance, maintenance, improvements, monitoring, enforcement and other costs. If funds are not secured at or before the completion of the transaction, the land trust has a plan to secure these funds and has a policy committing the funds to this purpose.

Excerpted from Land Trust Standards and Practices

Minimum Requirements for Accreditation

The Commission expects each applicant to have dedicated funds for conservation easement stewardship and enforcement. The Commission relies on funding recommendations from the Alliance, which are updated from time to time (see side bar). Note that the potential conservation easement defense captive insurance program is not a substitute for adequate land trust reserves.

While most applicants have steadily built their stewardship and enforcement funds over time, some land trusts have not secured adequate funds. If an applicant has not yet secured adequate funds, prior to accreditation it must have dedicated at least the minimum level of easement enforcement funding recommended by the Alliance for enforcement, have an ability to cover current stewardship expenses, have a plan for raising stewardship funds to at least the minimum recommended level, and have a policy committing the funds to this purpose.

If an applicant with fewer than 15 easements has not yet secured the Alliance's minimum recommended enforcement funds, the Commission may review the applicant's compliance on a case-by-case basis provided the applicant has at least \$3,000 per easement dedicated to enforcement along with the required fundraising plan and policy. (Please note that these numbers may change if the Alliance adjusts its recommendations.)

An applicant should also be able to show that it has assessed the costs of managing the lands it holds in fee and that it has a dedicated fund to cover emergency fee land management needs, issues related to title, and/or legal defense or enforcement costs.

Stewardship Funding Plans

If the applicant has at least the minimum of funding recommended for enforcement and has made progress toward funding its stewardship obligations but has not yet secured adequate stewardship funds, the Commission will require the applicant to submit a fundraising plan. The

Commission will evaluate the applicant's plan and will consider whether the land trust can demonstrate the capacity and intent to implement it over the next five years. If an accredited land trust submits an application for renewal of its accredited status, the Commission will evaluate the land trust's progress in achieving its fundraising goals. Evidence of a plan and commitment to implement the plan would include the following.

1. A target goal for the amount of stewardship and additional enforcement funding the land trust needs and the amount that it intends to raise over the next five years towards its goal, along with a description of how the target goal was determined. (For more information on how to set this goal, see the material referenced in the sidebar.)
2. A set of specific strategies with timelines that describe the plan for raising the amount indicated in (1) above in the next five years.
3. A description of any new policies or procedures that will be implemented to help carry out the plan (such as a stewardship funding policy, expanded investment policy, changes to stewardship and enforcement calculations and requested amounts, etc.).
4. A board resolution committing the land trust to implementation of the funding plan and to dedicating funds raised via the plan to stewardship and enforcement of conservation easements and/or fee holdings.

For more information

Visit the Land Trust Alliance's complete online resource, The Learning Center, <http://learningcenter.lta.org> for more information on implementing these practices. See especially "Conservation Capacity and Enforcement Capability," January 2007 and the Alliance course "Determining Stewardship Costs and Raising and Managing Dedicated Funds." Visit www.landtrustaccreditation.org or call 518-587-3143 for more information on the accreditation program.

9/11