

A man in a white shirt and khaki pants is sitting on the grass under a large tree, reading a book. The background shows a calm lake and distant hills under a clear sky.

GROW

*Land Trust Alliance's
Standards and Practices Curriculum*

 Land Trust Alliance
Together, conserving the places you love

COURSE CATALOG



CULTIVATING *Strong Land Trusts*

Saving land for the long term requires sound ethical, legal and technical practices. The Land Trust Alliance is pleased to offer a comprehensive educational program that uses cutting-edge educational technologies to respond to land trust needs. These courses are the first step in learning, adopting and implementing the practices that will make your land trust successful for the long term.

Land trusts now have access—for the first time ever—to a consistent, authoritative curriculum that explains how to implement *Land Trust Standards and Practices*, the guidelines for the responsible operation of a land trust. This curriculum is easily accessible, interactive and tailored to the unique needs of land trusts. It provides the tools you need to:

- Prepare your organization for accreditation
- Improve your individual skills, and
- Build your organization to its full potential.

Most importantly, our new online training system is available free to member land trusts around the clock, so that land trust professionals throughout the country can get the resources they need to save more land.

Together, let's nurture land trusts so they will flourish for generations to come.

Targeted Courses

Developed and Delivered by Land Trust Professionals

The Curriculum is for all land trust board members, volunteers and staff who want to improve their land trust's operations and land conservation activities. Take these courses if you want the land you save today to stay protected tomorrow. Curriculum courses will teach you how to implement *Land Trust Standards and Practices*. When executed, these practices indicate a land trust's ability to secure the long-term protection of land in the public interest.

Curriculum courses are available online, in self-study workbooks and in traditional workshop settings.

In Print

Order hard copies from our publications catalog, or organizational members can download a PDF file for free. www.lta.org/resources/publications

Online

Organizational members can access courses, download course books and other resources, participate in online discussion groups, and chat with subject experts in the field on The Learning Center— <http://learningcenter.lta.org>.

In Person

The courses will be delivered on a regular basis by qualified trainers at conferences and special events sponsored by the Land Trust Alliance and many partners. Your land trust can even host its own training by downloading student workbooks and instructor manuals. Contact learn@lta.org for more information about scheduling.

For additional information on this exciting program please see the Frequently Asked Questions section starting on page 14.



COURSE CATALOG



To assist in prioritizing your learning objectives courses have been categorized under one of the following Learning Paths:

- Governance
- Strong Organizations
- Land Protection
- Stewardship

Scheduled dates for the availability of each course are listed along with the course description.

LET'S GROW...

Avoiding Conflicts of Interest and Running an Ethical Land Trust

Author: Konrad Liegel, K&L Gates, LLP.

Can you name all of the disqualified persons in your organization? Do you know what to do if a major donor asks to amend her conservation easement? How will your land trust fare if it comes under close media or IRS scrutiny of its operations? If the answers to these questions keep you awake at night, then this course is for you. In this course, you will learn how to avoid or manage conflicts of interest and transactions with insiders as well as the ethical obligations of land trusts.

Practices Covered: 4A-Dealing with Conflicts of Interest; 4C-Transactions with Insiders; 1D-Ethics

Estimated Time to Complete: 4.5 hours (instructor-led course); 3.5 hours (self-study)

Land Trust Boards: Preparing for Perpetuity

Author: Marc Smiley, Decisions, Decisions.

A good board is the cornerstone of a successful land trust. How does your board measure up? This course covers the legal, ethical, and fiduciary responsibilities of the board; the roles and responsibilities of individual board members; and the link between a strong board and land conservation success. You will receive practical advice on how to build a strong and functional board and how to create bylaws that foster good governance. Course materials include sample documents and tem-

plates you can immediately use to tighten your board operations and develop board job descriptions. A board evaluation matrix is included.

Practices Covered: 3B-Board Composition; 3C-Board Governance; 3F-Board Approval of Land Transactions; 2B-Nonprofit Incorporation and Bylaws

Estimated Time to Complete: 6 hours (instructor-led course); 4.5 hours (self-study)

Form a Winning Board!

"I like the idea of multiple organizations coming together for a workshop then walking away with a draft policy for your organization."

*– Pilot Course Attendee,
Rally 2006: National Land
Conservation Conference*

Nonprofit Law and Recordkeeping for Land Trusts

Author: Jane Prohaska, Minnesota Land Trust.

Eighteenth-century poet Edward Young wrote that "records defy the tooth of time." But will your records withstand the bite of time? This course gives you what you need to know about the legal requirements for operating a land trust and keeping good organizational and transaction records. You will learn how to develop and implement policies to guide how your land trust creates, collects, retains, stores, protects, and disposes of these types of records. The course will also cover the issue of tax exemption, including the major requirements for maintaining charitable tax-exempt status and an overview of IRS Form 990.

Practices Covered: 2A-Compliance with Laws; 2B-Nonprofit Incorporation and Bylaws; 2C-Tax Exemption; 2D-Records Policy; 9G-Recordkeeping; 6B-Financial Records

Estimated Time to Complete: 6 hours (instructor-led course); 4.5 hours (self-study)

Mission, Planning and Capacity

Author: Jean Hocker, Conservation Service Company, LLC.

A land trust's mission is its compass, guiding board and staff in all of their work. Is your compass pointing in the right direction? If not, take this course and get your land trust back on the right path. This course will give you the knowledge and tools to lead your land trust in a review and, if necessary, revision of your mission. You will learn the key elements of a successful strategic plan; how to evaluate your existing programs and future responsibilities; and how to determine the human resources needed to accomplish these tasks.

Practices Covered: 1A-Mission; 1B-Planning and Evaluation; 7A-Capacity

Estimated Time to Complete: 4.5 hours (instructor-led course); 3.5 hours self-study



LEARNING PATH
Strong Organizations

Building the Foundation for Fundraising Success

Author: Marc Smiley, Decisions, Decisions.

Money may be the root of all evil, but it sure helps save land from bulldozers! This course provides an overview of the fundamentals of fundraising and the ethical and legal considerations that go along with raising funds. You will learn how to track fundraising expenses and determine what percentage of your overall organizational budget is spent on fundraising. The course covers how to develop procedures for ensuring funds are used as promised and how to write successful donor acknowledgement letters. Take your fundraising to the next level by ensuring that you are raising money in an effective and ethical manner.

Practices Covered: 5A-Legal and Ethical Practices; 5B-Accountability to Donors
Estimated Time to Complete: 6 hours (instructor-led course); 4.5 hours (self-study)

Determining Stewardship Costs & Raising and Managing Dedicated Funds

Authors: Paul Doscher and Brenda Lind, Society for the Protection of New Hampshire Forests; Ellen Sturgis, Convocant Systems; and Chris West, Colorado Cattlemen's Agricultural Land Trust.

How much will it cost your land trust to manage a conservation easement for the long haul? Arriving at a realistic figure is tricky—but essential—if you are going to keep your promises. In this course you will learn how to calculate the full stewardship expenses of conservation easements and fee land transactions; present and/or anticipated future staff costs; potential enforcement/defense costs for conservation easement holdings; and any necessary legal or technical advice. This course will also discuss the various systems for the investment and management of financial assets and different types of dedicated funds (operations, land acquisition, stewardship, enforcement/defense, etc.).

Practices Covered: 6F-Investment and Management of Financial Assets and Dedicated Funds; 11A-Funding Easement Stewardship; 12A-Funding Land Stewardship

Estimated Time to Complete: 6 hours (instructor-led course); 4.5 hours (self-study)

Financial Management of Land Trusts

Authors: Kay Sobl, Technical Assistance for Community Services, Eric Rowley, Rowley & Associates, P.C.

“We all need money, but there are degrees of desperation” – Anthony Burgess. Learn how to manage your land trust's finances so that you are equipped to protect the land you love. In this course you will receive an overview of how to create budgets, track income and expenses using financial reports and provide adequate oversight of your organization's finances.

Practices Covered: 6A-Annual Budget; 6B-Financial Records;
6D-Financial Review or Audit

Estimated Time to Complete: 6 hours (instructor-led course); 4.5 hours (self-study)



LEARNING PATH
Land Protection

Evaluating and Selecting Conservation Projects

Authors: Jane Ellen Hamilton, Hamilton Consulting; and Jonathan Moore.

Has your land trust ever struggled with deciding whether or not to accept a conservation easement? Ever regretted accepting an easement? Think your project planning process could be improved but not sure where to start? If so, this course is for you.

Learn how to determine what land or easement transactions are appropriate for your organization and go through the steps in planning a successful project. Learn how to develop and apply sound project selection criteria and how to document the public benefit of transactions. After this course, you will know the important elements of a site visit and how to use data gathered from the site visit for future baseline documentation reports or management plans. You will learn how to create customized acquisition criteria and project planning forms.

Practices Covered: 8B-Project Selection and Criteria; 8G-Project Planning; 8D-Public Benefit of Transactions; 8E-Site Inspection

Estimated Time to Complete: 7.5 hours (instructor-led course); 6 hours (self-study)

Tax Benefits and Appraisals of Conservation Projects

Authors: Larry Kueter, Isaacson Rosenbaum, P.C.; and Mark Weston, Hunsperger & Weston, LTD.

Do you fully understand the tax code requirements for conservation easement donations? Do you know how appraisers come up with the figures they do? If not, this course is for you! It provides an overview of issues involved with appraising conservation projects and the 2006 changes to the federal law affecting donations of conservation easements. You will become familiar with the different components of IRC §170(h), Forms 8282 and 8283, and will be able to explain a “qualified contribution” and “qualified donee.” You will learn the basic techniques appraisers use in putting a value on conservation easements. In this day and age, every land trust needs to know how to review an appraisal for consistency with tax code requirements and with regional values.

Practices Covered: 10A-Tax Code Requirements; 10B-Appraisals

Estimated Time to Complete: 6 hours (instructor-led course) 4.5 hours (self-study)

Conservation Easement Drafting and Documentation

Author: Jane Ellen Hamilton, Hamilton Consulting.

This course will give you an overview of how to plan conservation easement projects, draft the easement to fit the plan, and prepare baseline documentation materials to support the monitoring and enforcement of the easement. You will learn how to draft a baseline documentation policy or procedure for your land trust, and how to work with professionals to create comprehensive baseline reports and maps. In short, you will have the knowledge and tools to take your easement drafting to the next level.

Practices Covered: 8G-Project Planning; 9E-Easement Drafting; 11B-Baseline Documentation Report

Estimated Time to Complete: 9 hours (instructor-led course); 7 hours (self-study)

Acquiring Land and Conservation Easements

Authors: Monica Henderson, Stites & Harbison, PLLC; MaryKay O'Donnell, Land Trust Alliance.

If land protection is the cornerstone of conservation, learn how to make the acquisition process a solid foundation on which to build your organization's work. Get an overview of laws on title to property, steps to take in acquiring land, and how to work with attorneys to ensure sound transactions and take care of title matters to make sure that your conservation efforts stand the test of time.

Practices Covered: 9G-Recordkeeping; 9A-Legal Review and Technical Expertise; 9H-Title Investigation and Subordination; 9J-Purchasing Land

Estimated Time to Complete: 6 hours (instructor-led course); 4.5 hours (self-study)

Selling and Transferring Land and Easements

Authors: Margaret Kohring, The Conservation Fund; Laurie Hunter

Contributing Author: Peter Stein, Lyme Timber Company

From time to time a land trust may need to sell or transfer its land or conservation easements. But how do you ensure that the land's conservation values are protected once it leaves your control? Take this course so that you can fulfill your obligations to your donors and to the land. This course will provide an overview of the ethical considerations and technical steps involved in selling and transferring lands or interests in land held by the organization.

Practices Covered: 4C-Transactions with Insiders; 9K-Selling Land or Easements; 9L-Transfers and Exchanges of Land

Estimated Time to Complete: 6 hours (instructor-led course); 4.5 hours (self-study)

Strategic Conservation Planning

Author: Ole Amundsen, III, The Conservation Fund

For a land trust to be successful in fulfilling its mission, it must identify, prioritize, pursue, and protect land that meets the land trust's conservation objectives. Often times however, land trusts are faced with multiple projects that are appealing but may not fulfill the mission. So how do you accurately determine the best projects for your land trust?

This course will give you the tools to both make sound conservation decisions and remain on good terms with landowners to whom you have to say "no." You will explore the major components of a successful planning process and look at examples of how a well thought-out conservation vision resulted in conservation success. You will also learn to use Geographic Information Systems (GIS) to prioritize your conservation work and explore key tools that can help you effectively and efficiently implement your conservation vision.

Practices Covered: 8A-Identifying Focus Areas

Estimated Time to Complete: 6 hours (instructor-led course); 4.5 hours (self-study)

"For a couple of years, the New Jersey Conservation Foundation (NJCF) had been thinking about revising its conflict of interest policy," explained Stephanie Monahan, former program director at NJCF. "But the task kept getting pushed to the bottom of our to-do list." The effort was challenging because NJCF would need to research language used by other organizations, then create its own policy from those materials. In March 2006, NJCF sent a staff member to the Land Trust Alliance's pilot course, "Avoiding Conflicts of Interest and Running an Ethical Land Trust," held at the New Jersey Land Conservation Rally. At the training, the staff member learned the importance of a good conflict of interest policy and received a template that NJCF could use to craft its own policy. "We went through the policy template process. It was adopted at our very next board meeting, and then signed by the board and staff," Stephanie said.



Michele Byers, NJCF executive director, says "The Land Trust Alliance's ethics course enabled us to adopt a sound conflict of interest policy, while minimizing the burden on staff of creating one from scratch. Operating in a responsible and ethical manner is very important to us as an organization, and participating in this course helped us to ensure that we are doing just that."

The Curriculum APPLIED



LEARNING PATH
Stewardship

Caring for Land Trust Properties

Authors: Hugh Brown, Indiana Land Protection Alliance and Ball State University; and Andy Pitz, Natural Lands Trust.

“The land is the host and humans merely guests.” – Chinese Proverb. How can you be a good guest and care for the land you have been entrusted with? In “Caring for Land Trust Properties” you will learn to manage properties more effectively. The course discusses the different types of land management plans and how to select the right one for your land trust. You will learn how to create policies for developing management plans and monitoring properties in your care.

Practices Covered: 8G-Project Planning; 12C-Land Management; 12D-Monitoring Land Trust Properties; 12E-Land Stewardship Administration

Estimated Time to Complete: 9 hours (instructor-led course); 7 hours (self-study)

Conservation Easement Stewardship

Authors: Renee Bouplon, Agricultural Stewardship Association, Brenda Lind, Society for the Protection of New Hampshire Forests.

Are you prepared to care for your easements until the end of time? Let the Land Trust Alliance help you manage this critical responsibility. This course will give you an overview of how to monitor your easements and build long-term relationships with landowners (the key to long-term success with easements). You will learn the different methods for monitoring easements; how to select and implement the method that works best for your land trust; and how to use a baseline documentation report to protect the land.

Note: Creating the baseline documentation report is part of “Conservation Easement Drafting and Documentation.” Easement amendments and enforcement are covered in “Managing Conservation Easements in Perpetuity.”

Practices Covered: 11D-Landowner Relationships; 11B-Baseline Documentation Report; 11C-Easement Monitoring

Estimated Time to Complete: 7.5 hours (instructor-led course); 6 hours (self-study)

Managing Conservation Easements in Perpetuity

Author: Leslie Ratley-Beach, Land Trust Alliance.

Have you ever received a request to amend an easement and weren't sure of the right course of action? Unsure about how to decline a request without alienating the landowner? Have you been confronted with a new landowner who is unaware of or reluctant to abide by the terms of the easement? If so, this course can help. Learn how to manage change more effectively so your conservation easements will still be here tomorrow. You will learn to distinguish between easement defense and enforcement, develop a system to educate landowners and take the first steps in drafting an enforcement policy to safeguard what you have worked so hard to protect.

Practices Covered: 9G-Recordkeeping; 11E-Enforcement of Easements; 11I-Amendments

Estimated Time to Complete: 12 hours (instructor-led course); 9 hours (self-study)

Frequently Asked QUESTIONS



Why take this training?

Saving land for the long term requires sound ethical, legal and technical practices. These courses are the first step in learning, adopting and implementing the practices that will make your land trust successful for the long term.

Who should take this training?

The curriculum is for all land trust board members, volunteers, and staff who want the land they save today protected tomorrow. The practices covered form the foundation of responsible and effective land trust operations and land conservation activities. It's not just for accreditation!

How are courses being delivered?

The courses will be available in print, online and at conferences. Land Trust Alliance members can download a free PDF or access the courses online at <http://learningcenter.lta.org>. Everyone else can buy a curriculum book or pay a nominal fee to download an electronic PDF from <http://www.lta.org/resources/publications>.

The courses will be delivered on a regular basis by qualified trainers at conferences and special events sponsored by the Land Trust Alliance and many partners. Your land trust can even host its own training by downloading student workbooks and instructor manuals. Contact the Alliance at learn@lta.org for more information about scheduling.

What will I learn in the training?

Each course will contain:

- Sample documents to provide learners with examples of how other land trusts have implemented the practice;
- Templates (if applicable) to guide learners in writing their own policies;
- Case studies to demonstrate how land trusts implemented the practices; and
- Lists of additional resources for further study.

When the learner leaves training, s/he will be able to:

- Explain the key components and the importance of the practice(s);
- Know when, how, and what strategies to use in implementing the practice(s) in the near and long term; and
- Understand how to plan for the resources (human and financial) and know where to find further information or resources to help implement the practice(s).

Are there any prerequisites to the training?

No, the course materials are designed for learners new to the subject or those who want a refresher.

Will this training be required for accreditation?

No! It is a resource for organizations that need to gain certain skills or implement specific practices before applying for accreditation. Taking a course will not guarantee success in accreditation, but will provide the background and skills necessary for a land trust to prepare for accreditation.

Will this training replace the other training currently available?

No, this training will augment, not replace, training now offered through state and regional land conservation conferences, Rally, and other events.

When will training be available?

Courses are now being rolled out across the country; check www.landtrustalliance.org for the latest information. Pages 4-13 of this brochure provide an overview of the courses and the practices covered in each.

Frequently Asked QUESTIONS

Will I need to take all of the courses?

The Land Trust Alliance does not anticipate that many people will complete all 15 courses. Rather, individuals will choose courses that fill gaps in their expertise. Land trusts should assess the knowledge and skills of their board, staff and volunteers to determine who needs to be trained in what practices in order to implement *Land Trust Standards and Practices* effectively.

These courses are designed to teach new land trust professionals about *Land Trust Standards and Practices*, while also furthering the training and perhaps introducing new techniques for folks that have been in the business for years.

Who is creating and teaching the new curriculum?

The Land Trust Alliance has chosen skilled land trust practitioners to write these courses. In addition, all courses are peer-reviewed to ensure accuracy and regional diversity of practice. See the list of course authors on the following pages.

In addition to writing the books, the course authors are creating instructor manuals that will enable experienced practitioners in any region of the country to teach the courses. This strategy will help make the curriculum widely available across the country through training events sponsored by land trusts, state and regional land trust service providers and others.

How will instructors get training materials?

Qualified instructors will be able to download the materials from the Land Trust Alliance website, purchase copies from the Land Trust Alliance or obtain them from a regional service provider.

How will course materials be kept up-to-date?

The Land Trust Alliance will design and implement a system to evaluate and revise the Curriculum. We will continue to review Rally, regional conferences, the Land Conservation Leadership Program, and other training programs in order to provide land trusts with the resources they need. Your feedback is welcome and encouraged!

How can I get more information?

Information about the Standards and Practices Curriculum is on our website <http://www.lta.org/learning/sp>. We will provide regular updates on the site and through our monthly eNewsletter. For more information, contact us at learn@lta.org or 202-638-4725.

Thanks,

thanks to thee, my worthy friend, For the lesson thou hast taught!

– Henry Wadsworth Longfellow



The Land Trust Alliance would like to give its sincerest thanks to the following members of our community who gave their time and expertise so generously to this project. Without their dedication, skills and commitment to the success of land conservation in this country, the Standards and Practices Curriculum would not exist.

Acquiring Land and Conservation Easements

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Building the Foundation for Fundraising Success

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Photo on page 11 by Clem Fiori. Photos on page 17: far left by Lynn Betts; far right by Bob Nichols; USDA Natural Resources Conservation Service.

EXPLORE.
CONNECT.
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The Learning Center

JUST LAUNCHED! New Online Resource for Land Conservation—Convenient, Easy to Use, & Informative.

The Learning Center is the place if you want to hone your conservation skills and grow your organization to its full potential. And it's **FREE** to Land Trust Alliance members.* So log on today!



AT THE LEARNING CENTER, YOU CAN:

- Learn all the essentials for land conservation
- Take courses on *Land Trust Standards and Practices*, or prepare for accreditation
- Design your own learning path on topics such as Governance, Strong Organizations, Land Protection, and Stewardship
- Ask the experts in moderated forums
- Access reference materials in the conservation library (formerly LTAnet)

VISIT THE LEARNING CENTER TODAY AT:

<http://learningcenter.lta.org>

FREE DEMO

Sign up for a free online demonstration for your land trust.

E-mail learn@lta.org to reserve your session!

*Free access to The Learning Center is available for the staff, board, and volunteers of our Land Trust Members; our Professional, Nonprofit, and Government Partners; and to Individual Members (\$250+ level).



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www.landtrustalliance.org

For more information on the Standards and Practices Curriculum and The Learning Center, go to <http://www.lta.org/learning>.



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