

The Learning Center: On-line Tools to Advance Land Trust Excellence

Rhode Island
Land & Water Conservation Summit

March 27, 2010

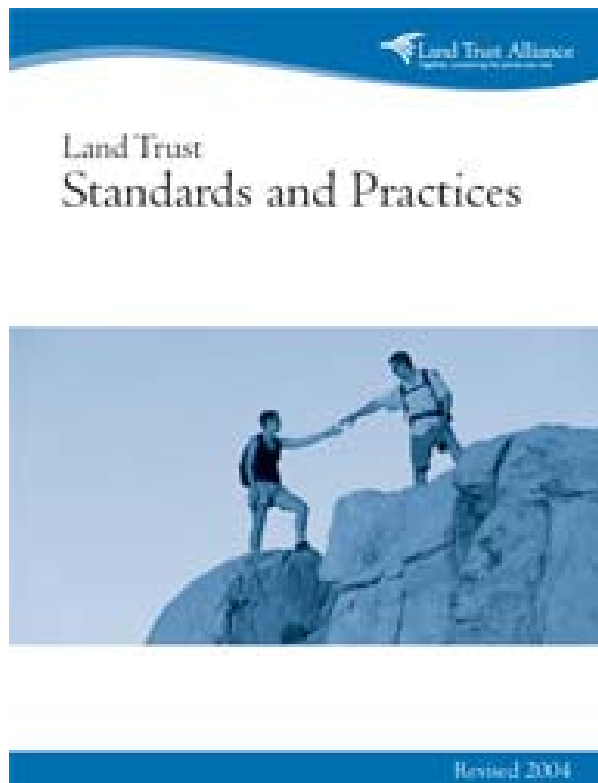
Ethan Winter



The Learning Center: On-line Tools to Advance Land Trust Excellence

- *Land Trust Standards and Practices*
- Standards and Practices Curriculum
- Assessing Your Organization
- The Learning Center
- Pathways to Accreditation

Land Trust Standards and Practices



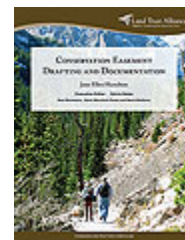
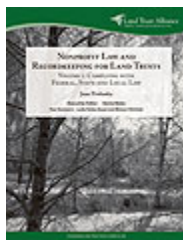
Summary



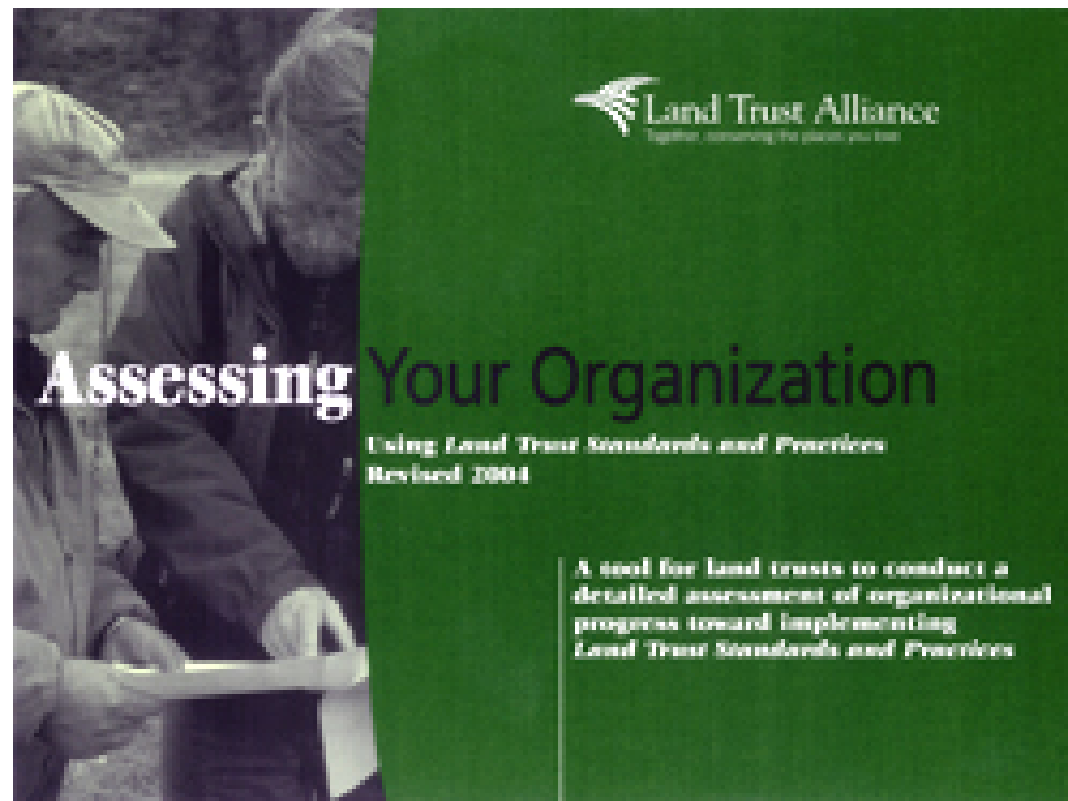
Complete Texts

Standards and Practices Curriculum

- Currently 15 courses – use to prepare for accreditation, board/staff training, etc.
- Designed for self-study as well as trainings
- Written by expert practitioners; peer reviewed
- Hard copies or downloadable PDF files



Assessing Your Organization



In-Person Training Opportunities

- Land Trust Alliance regional conferences
- State and regional conferences
- *Rally: National Land Conservation Conference, October 2-5, 2010, Hartford, CT*
- Training through other service providers



Online Training: Self-Guided or Webinar

Self-Guided

- Free to Alliance members anytime, anywhere
- Same content as S&P curriculum
- Accessible on The Learning Center

Webinars

- Expert Trainers (S&P and emerging issues)
- 90-minute sessions - \$50 per connection
- <http://www.landtrustalliance.org/learning/training>



<http://learningcenter.lta.org>

- No “www”
- Access is free for:
 - Alliance member land trusts
 - Alliance Partner Organization (\$250+)
 - Individual Land Trust Alliance supporters (\$250+)
 - To join: <http://www.landtrustalliance.org/get-involved/membership/join>

The Learning Center

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Our easy-to-use guide will get you started in no time!

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Welcome Anne Murphy!

Please welcome Anne Murphy as our new expert for the [Land Protection and Stewardship forums](#).

Spring 2010 Saving Land

- >> [Nature as Nurturer: Protecting Land to Protect Human Health by Kendall Slee](#)
- >> [The Next Frontier: Conservation and Renewable Energy by Paul Doscher](#)

UPCOMING EVENTS

Upcoming Webinar With Rob Levin
Successful Organizational Recordkeeping for Land Trusts
March 24, 2010, 2:00pm ET
\$50 per Connection
Don't delay -- only a few spaces left!

WHO'S ONLINE

Active in the last 60 minutes:

- + Deborah Chapman
- + Elisabeth Moore
- + Emily Parish
- + Eric Grace
- + Jessica Schultz
- + Joanne Martonik
- + Judith Goldsborough
- + Karen Sperr
- + Katelyn Homeyer
- + Kathleen Gilman

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We have 13 self-paced courses available now and more arriving soon. Check back often!

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Click on a course title below to learn more about each course, or visit any of the learning path homepages.

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- ★ **Land Trust Boards: Preparing for Perpetuity**
- ★ **Mission, Planning and Capacity**
- ★ **Nonprofit Law and Recordkeeping - Volume I: Complying with Federal, State and Local Law**
- ★ **Nonprofit Law and Recordkeeping - Volume II: Recordkeeping Essentials**

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- Introduction
 - Standards and Practices for This Course
 - Practice 6B, Financial Records
 - Practice 9G, Recordkeeping
 - What Will I Learn in This Course?
 - What Resources Are Available to Me During This Course?
 - Obtaining Independent Legal and Financial Advice
 - Evaluate Your Practices
 - Chapter One • Background and Legal Overview of Recordkeeping Principles
 - Chapter Two • Land Trust Records
 - Chapter Three • Records Policies and Procedures
 - Next Steps

GOVERNANCE
NONPROFIT LAW AND RECORDKEEPING FOR LAND TRUSTS, VOL II
EXERCISES for Nonprofit Law and Recordkeeping for Land Trusts: Volume 2
Recordkeeping Essentials for Land Trusts

Chapter One: Background and Legal Overview of Recordkeeping Principles

Exercise 1: Tracking Agreements over Time ♦ The Minnesota Land Trust and the Rainy Lake Conservancy

This exercise will show you how formal, written agreements are important for the correct, long-term administration of donor contributions.

Download this exercise: [Tracking Agreements over Time ♦ The Minnesota Land Trust and the Rainy Lake Conservancy.](#)

Chapter Two: Land Trust Records

Exercise 1: What Records Does Your Land Trust Need?

Read the scenario presented in this exercise. Then determine what records your land trust will need to cope with each situation that's presented. Why would you need the records you selected? Guidance on the exercise follows.

Download this exercise: [What Records Does Your Land Trust Need?](#)

Exercise 2: Approving a Conservation Easement

Read the fictional scenario presented in this exercise, and answer the questions about the scenario. Guidance on answering the questions follows.

Download this exercise: [Approving a Conservation Easement.](#)

Chapter Three: Records Policies and Procedures

Exercise 1: Creating a Land Trust Records Policy

This exercise can be completed in a training session but may be most useful as a board/staff/volunteer exercise at your land trust. The purpose is to help you begin to develop a written records policy that meets the unique needs and situation of your land trust. If your land trust already has a records policy, use this exercise as a tool to evaluate its effectiveness.

Download this exercise: [Creating a Land Trust Records Policy](#)

- + Exercises
- + Case Studies
- + Add'l Resources
- + Sample Documents
- + Evaluations
- + Glossary
- + To-Do List

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LEARNING TOOLS

- Listen to an Introduction (MP3 file)
- Download this Course Book
- Create Your Policy
- Meet the Course Team
- Resources

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Network with colleagues in our discussion forums and tap into the expertise of conservation experts across the country. Ask questions. Share your success stories. Answer questions and share your experience! **Click on the links below to join a discussion.**

JOIN THE DISCUSSION

Got Questions?

Judy Anderson and Brenda Lind, two noted experts in the land conservation field, are available to answer your questions. Judy is covering Governance and Strong Organizations topics, and Brenda is covering Land Protection and stewardship. Click on the >> **View Forum** links to the right of each to read the posts or join in.

GOVERNANCE

Recent Posts >> View Forum

- + RE: [Governance] Stewardship donations and fees: I've written two ite...
- + Stewardship donations and fees: I would appreciate a...
- + Board Development Webinar Next Week --Space Still Available : Join Marc Smiley nex...

STRONG ORGS

Recent Posts >> View Forum

- + Board Development Webinar Next Week --Space Still Available : Join Marc Smiley nex...
- + Staff work planning-are you doing it?: Hi everyone- Fo...
- + Re: AYO's-scope of work examples: Thanks Judy, You ...

LAND PROTECTION

TAKE A HIKE

Help your fellow land trusters find the perfect hikes in your area (or the world!)

Recent Posts

- + Balance Sheet Valuation of Conservation Easements
- + Conservation purposes test for farmland
- + Wind Farm Mitigation

>> View Forum

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- + Benjamin Lucas
- + Carol Mayes
- + Emily Hague
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LIBRARY (LTAnet)



New name, new look--same great resource! LTAnet is now the The Learning Center's Library. We've moved all the information and full-text searching of LTAnet into a new, easy-to-use package. Use the search box below, browse through categories, or just click on the resource tab to check out one of the nation's largest collection of materials on private land conservation.

Let us know what you think! Send an e-mail to tlc@lta.org

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SEARCH LIBRARY

[SEARCH TIPS](#)

Browse by Topic

Communications

Education, Media relations, Publications, ...

Land transactions

Fee acquisition, Funding, Project selection, ...

Fundraising

Annual giving, Grants and foundations, Membership, ...

Land Trust Alliance

Publications, Information Services, Training and Conferences, ...

LTANET ADMINISTRATION

- + Hierarchies (Categories)
- + Objects
- + Conferences
- + Ratings
- + Browse Groups

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NEW RESOURCES

New! - Saving Land Extra Content:

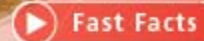
"Keeping Talented People on Staff" reference material - 2 sample documents from Gallatin Valley Land Trust:

• Personnel Policies and Procedures

• Schedule of Benefits

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Home > Objects > Browse Standards & Practices

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2004 LAND TRUST STANDARDS AND PRACTICES

[12 STANDARDS, 88 PRACTICES AND OVER 400 SAMPLE DOCUMENTS](#)

[Download a PDF of the revised *Land Trust Standards and Practices*](#)

Download the Background to the 2004 Revisions of *Land Trust Standards and Practices*

[Order Printed Copies](#)

Standards

Current Standards

Standard 1: [Mission](#)

The land trust has a clear mission that serves a public interest, and all programs support that mission.

Download: [.doc](#) [.pdf](#)

Standard 2: [Compliance with Laws](#)

The land trust fulfills its legal requirements as a nonprofit tax-exempt organization and complies with all laws.

Download: [.doc](#)

Standard 3: [Board Accountability](#)

The land trust board acts ethically in conducting the affairs of the organization and carries out the board's legal and financial responsibilities as required by law.

Download: [.doc](#)

Standard 4: [Conflicts of Interest](#)

The land trust has policies and procedures to avoid or manage real or perceived conflicts of interest.

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[Rally 2002](#) | [Rally 2003](#) | [Rally 2004](#) | [Rally 2005](#) | [Rally 2006](#) | [Rally 2007](#) | [Download attendee list](#)

[\(edit conference header\)](#)

Rally 2008

Session	Title	Year	Track	Presenter(s)
SESSION A				
A01 Saturday	Biodiversity for Dummies: Why the Diversity of Life Matters and How to Communicate it to the Public	2008	Biodiversity	Riordan, Rob
A02 Saturday	Joining Forces: Creating Partnerships to Save Land and Historic Places	2008	Cities, Culture and History	Nicholas, Wendy

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Private forums require invitations from a forum moderator. Send a message to forums@lta.org if you would like to learn more about participating in one or starting one of your own.

[manage content](#)

MY PAGE

First names Rob

Last name Aldrich

Email raldrich@lta.org

Screen name Rob Aldrich

Home page

About You
Hi, I'm the director of information services for the Land Trust Alliance. Let me know what you think of the site!

Edit

Uploaded on February 27, 2008.

MY COMMUNITIES

Community Of Practice

- + Leader
- + Diversity in Conservation
- + Land Trust Alliance Trainers and Consultants
- + Conservation Easement Stewardship Funding 2008 Online Course
- + Alliance Field Programs
- + Land Trust for Tennessee
- + Land Trust Alliance Evaluation Project
- + ABC Land Trust
- + Preparing for Perpetuity: Building Your Board
- + State Land Trust Associations and Service Centers

Special Community

- + Site Development
- + Conservation Defense
- + Western Partners
- + Fundraising Forum

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THE CONSERVATION PRACTITIONER'S NUMBER ONE RESOURCE!

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HOT TOPICS

Check out Pathways!

Pathways to Accreditation is a new online private meeting space where staff, volunteers and board members can collaborate on an organizational assessment and develop policies to help build a strong organization. For land trusts on the accreditation path, the interactive website tool helps land trusts prepare for registration, completing their application, task development and document management.

Welcome Anne Murphy!

Please welcome Anne Murphy as our new expert for the [Land Protection and Stewardship forums](#).

Spring 2010 Saving Land

- >> [Nature as Nurturer: Protecting Land to Protect Human Health by Kendall Slee](#)
- >> [The Next Frontier: Conservation and Renewable Energy by Paul Doscher](#)

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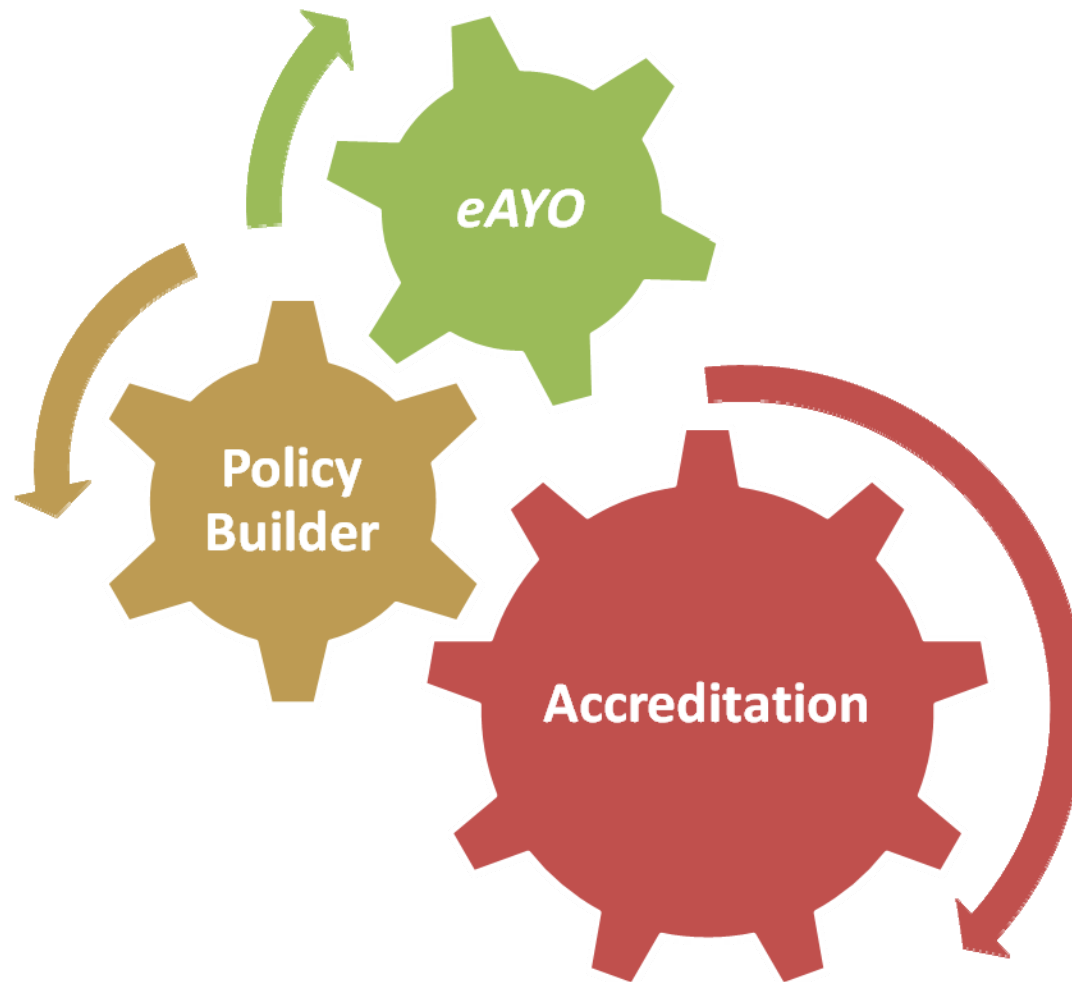
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Pathways = Tools for Land Trusts





Assessing Your Organization

My Dashboard

Asterisks designate Accreditation [Indicator Practices](#).



Mission

The land trust has a clear mission that serves a public interest, and all programs support that mission.

How well does this describe the land trust?
1 = not true
4 = always true
? = don't know

A. **Mission.** The board adopts, and periodically reviews, a mission statement that specifies the public interest(s) served by the organization.

1 2 3 4 ?

How does the land trust mission address the public interest?

Policy Builder

[My Dashboard](#)

Instructions

[From a Land Trust Accreditation Commission Guidance Document:](#)

"The Commission reviews a variety of documents from applicants including the specific policies required by the accreditation indicator practices. Each required policy is reviewed for compliance with the indicator practice and to see that it is tailored to the applicant organization. The Commission also looks at evidence the applicant provides to show that the policies are being implemented."

As a prerequisite for registering for accreditation, your land trust will need to provide certain written, board-approved policies. The policy builder helps you to create those if you don't have them, as well as other policies that will be useful in demonstrating your organizations ability to implement other practices.

The policy builder units use the same "Putting it Into Practice" material found in the Standards and Practices Curriculum to walk you through the background of why a particular policy is needed; ask questions to elicit special circumstances of your lands trust that should be addressed, and allow your team to create a policy that you can approve and use.

Because the Land Trust Accreditation Commission is an independent program of the Land Trust Alliance, we cannot guarantee that the Commission will approve all policies created with our policy builder. Also, the Accreditation Commission requires evidence that your land trust implements your policies.

Required Policies:

- [4A – Conflict of Interest Policy](#)
- [9G – Records Policy pursuant to practice 2D](#)
- [11E – Conservation Easement Enforcement Policy](#)
- [11I – Conservation Easement Amendment Policy](#)

Note: This policy is not required of every applicant. It is only required when a land trust board does not approve each land or easement transaction, and has instead delegated this important responsibility to another party.

- [3F – Delegation of Transaction Approval Policy](#)

The following policies are not *required* by the Commission, but may be helpful in developing and maintaining your records:

- [6F – Investment Policy](#)
- 11B – Baseline Documentation Report
- 11C – Conservation Easement Monitoring

Tasks

Status	Task	Team Member(s) Assigned	Due Date	Date Completed	Options
New	4A – Conflict of Interest Policy		None		0 0
New	9G – Records Policy pursuant to practice 2D		None		0 0
New	11E – Conservation Easement		None		0 0

CONFLICT OF INTEREST POLICY TEMPLATE

Directions

1. This template provides sample language that is appropriate for land trust conflict of interest policy. However, it is essential that you customize key parts of the template to make it useful for your land trust. If you simply cut and paste language without thinking through the impacts of the policy on your land trust's unique situation, may leave you vulnerable when most in need of protection.
2. You need to first understand what makes a good policy. So, read [IRS Instructions for Form 1023 – Appendix A: Sample Conflict of Interest Policy](#) and [sample conflict of interest policies](#).
3. Read through the template below. The blank line will be automatically filled with your land trust's name.

Throughout the template, there are text boxes that contain questions, examples or sample language that cover key points that must be tailored to the unique situation of your land trust. Anything typed into the text boxes will automatically be placed in the generic easement template when downloaded. For example, if you don't delete the questions they will appear in the final policy. Remember, the more detailed, complete and accurate your answers are, the better your preliminary conflicts of interest policy draft will be.

4. When completed, click on "Download My Policy" to save a copy, which you can then open in Microsoft Word or other word processing software.
5. Take your policy to your counsel for review before board adoption.
6. Implement your policy!

4A: Conflict of Interest Policy Template

Your conflict of interest policy should begin with a statement of purpose that discusses the goals of the policy and the principles it relies upon. The statement of purpose is particularly important because your land trust's policy on conflicts must be consistent with your organization's mission. All decisions made under this policy will follow from this crucial section. Add here any additional clauses specific to your land trust and its mission. This section should also include whether or not you will post the policy on your land trust's website or how members of the public can obtain copies of the policy.

Article I

PURPOSE

Land Trust Alliance's effectiveness depends upon maintaining the highest levels of credibility, confidence and trust with the community it serves and all parties with whom it works. For this reason, it is crucial that Land Trust Alliance have responsible, well conceived conflict of interest policies and procedures to avoid real or perceived Conflicts of Interest.

All persons associated with Land Trust Alliance are reminded that the decisions and activities of the board of directors and staff, whether or not addressed in this policy, are governed by an overriding requirement of honesty, good faith and fiduciary responsibility for the organization and to the community it serves.

This policy is intended to supplement but not replace any applicable state or federal laws governing Conflicts of Interest applicable to charitable trusts.

Eligibility Questionnaire

Please complete the questions below to see if you're eligible for accreditation.

Are the following statements true for your land trust?

- We are committed to continuous improvement and building a strong land trust.
 Yes No
- We are committed to the long-term stewardship of land and/or conservation easements.
 Yes No
- We are committed to upholding the credibility of the land trust community.
 Yes No

Is your organization eligible for accreditation?

- Is your land trust a U.S.-based 501(c)(3) tax-exempt organization or a quasi-governmental organization?
 Yes No
- Has it been incorporated for at least two years?
 Yes No
- Is your organization focused on acquiring and/or stewarding conservation land or conservation easements?
 Yes No
- Have you completed two direct land or easement acquisition projects? (In a direct land or easement acquisition project the applicant organization is included in the chain of title on a fee parcel or is the grantee of a conservation easement.)
 Yes No
- Have you adopted Land Trust Standards and Practices (2004)? Note you will need to provide date of adoption.
 Yes No

Free Technical Assistance

- For Board or Staff
- ½ hr to 1 hr long
- **To Schedule:**
 - E-mail: Learn@lta.org
 - Call (202) 638-4725

Top 10 reasons to use these resources

- Network with Colleagues
- Learn New Skills
- For Members, It's Free!
- Training for Staff & Board
- Prepare for Accreditation
- Implement Best Practices
- Preserve / Increase Public Trust
- Ensure the Permanence
- Build Strong Land Trusts
- Save More Land!