

THE  
CONSERVATION FUND



*Talking to Landowners*  
*Rhode Island Land & Water Summit*  
*March 14, 2015*

The Conservation Fund works at the intersection of conservation and community—we believe that environmental protection and economic vitality are inseparable.

## WHAT WE DO



**Conservation Acquisition**  
Land, Water & Wildlife Protection



**Conservation Leadership Network**  
Collaborative Solutions



**Freshwater Institute**  
Aquaculture & Water Quality



**Go Zero**  
Carbon & Climate



**Land Conservation Loans**  
Finance & Expertise



**Mitigation Solutions**  
Infrastructure Mitigation



**Natural Capital Investment Fund**  
Business Finance



**Resourceful Communities**  
People, Places, Opportunities

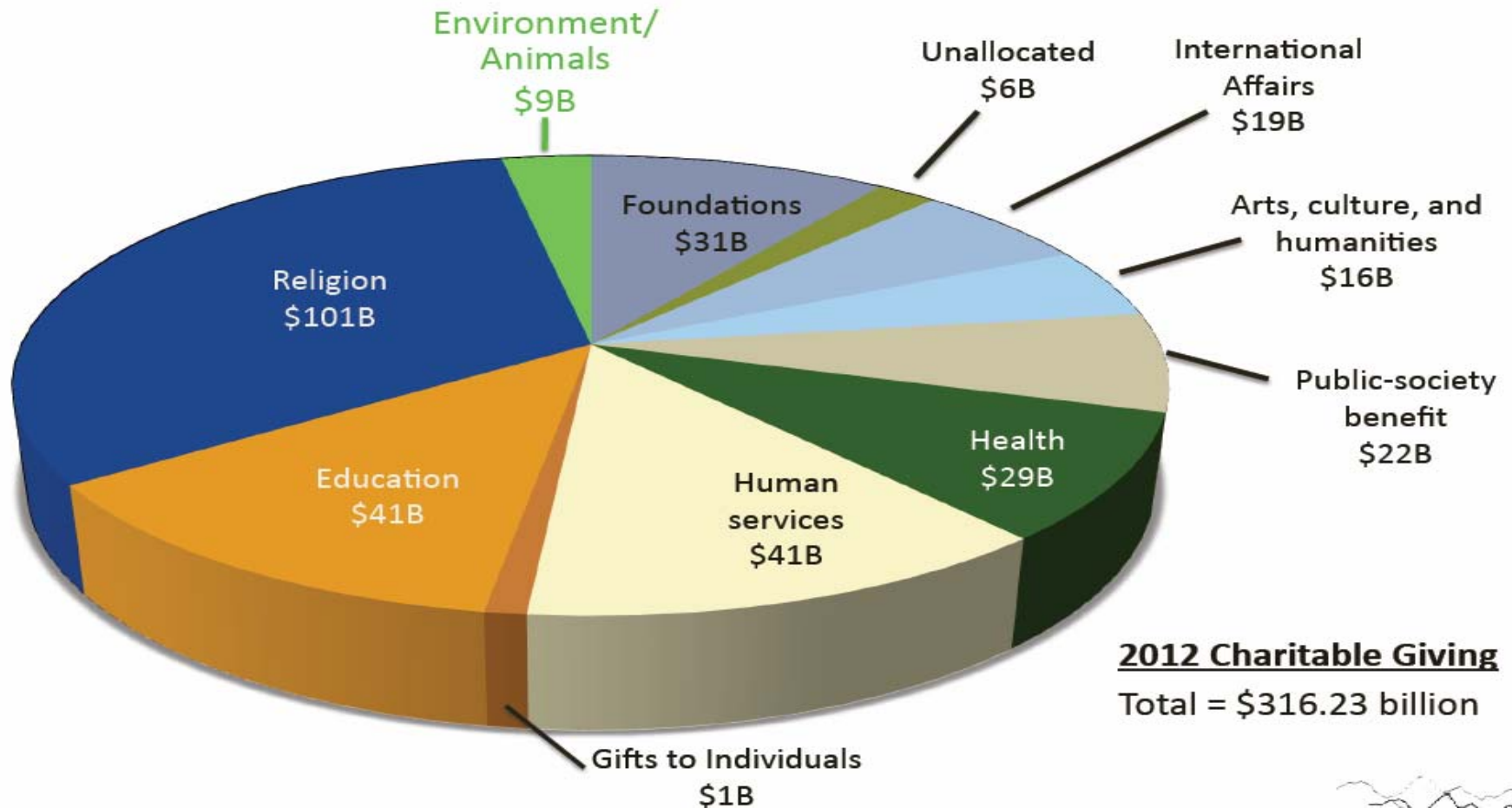


**Strategic Conservation Planning**  
Green Infrastructure



**Working Forest Fund**  
Forestry

# Challenge: Conservation's Philanthropic Share < 3%



- Understand Best Practices
- Learn tips & tricks for more effective communication
- Project Clinic



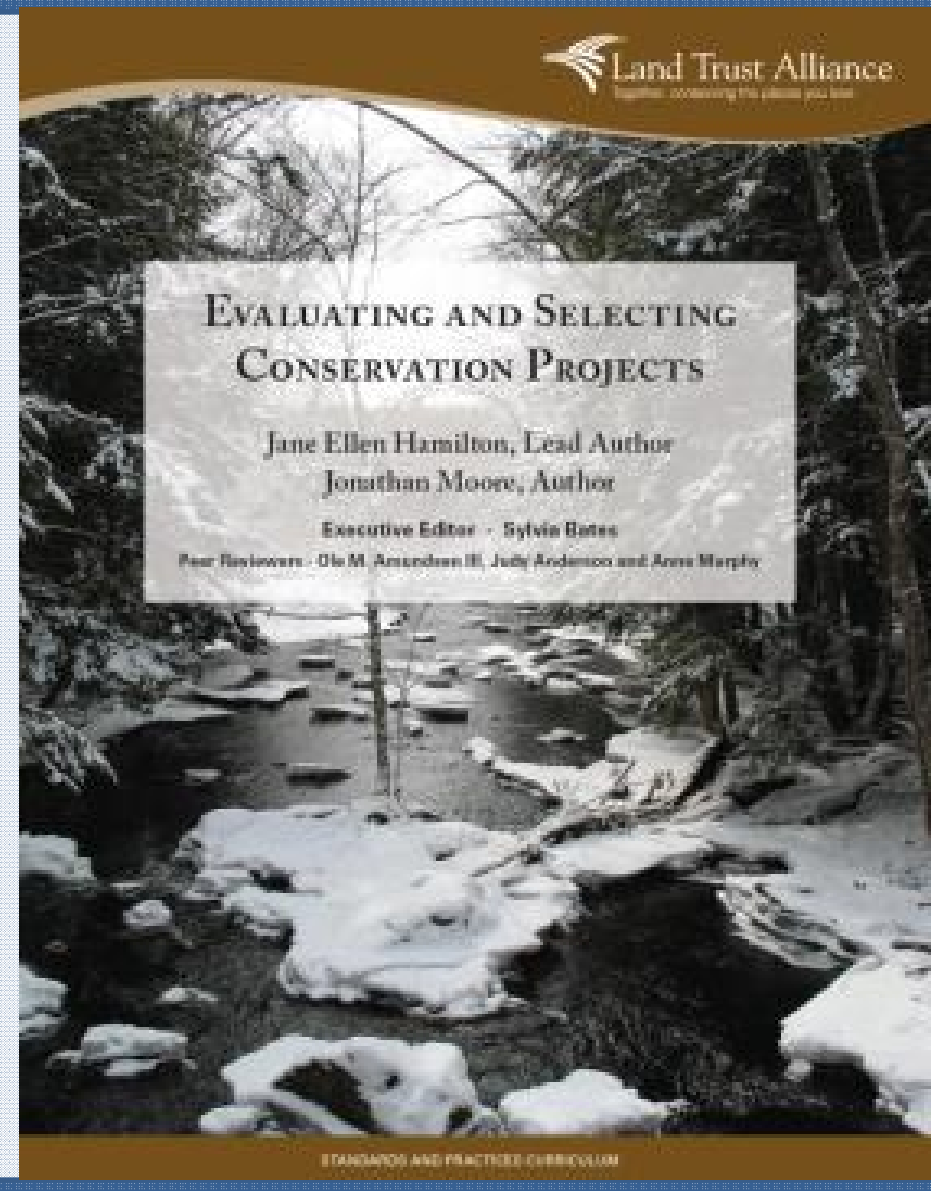
Conservation  
Goals

Financial  
Goals



## Standard 8

- Defined Selection Process
- Meets Federal & State Requirements conservation values → public benefits
- Site Inspection
- Evaluate Best Tool & Potential Partners
- Acquisition = Stewardship Obligation
- Risk vs. Reward



## Standard 9

- Legal Review
- Independent Legal Advice
- Due Diligence
- Documentation of Purposes (Intent)
- Recordkeeping
- Title Work
- Valuation
- Selling Land or CEs
- Transfers or Exchanges



## Standard 10

- Tax Code Requirements
- Appraisals
- No Assurances
- Donee Responsibilities (8283 Form)





- Elevator Speech
- Project Intake Form
- Model Easement & Information
- Model Contract/P&S Agreement
- Model Donation Agreement
- Stewardship Speech
- Engagement Letter
  - ✓ No Legal Advice
  - ✓ Tax Code Reference
  - ✓ Who covers fees?



## Mailings

- Generate Leads

## Newsletters

- Corporate Landowners

## Events

- Community Groups
- Advisor/CLE trainings

## Social Capital/Resources *(watch for COIs!)*

- Board?
- Partners?
- Volunteers?
- Advisors/Consultants?
- Neighbors?





Family

Occupation

Recreation  
*or Religion*

Dreams



- Mission Fit?
- Conservation Values? → trade/gift lands?
- Fee Simple or Conservation Easement?
- Donation, Purchase or Bargain Sale?
- Timing?
- Value?

- Try to make warm calls
  - Consider donation?
  - Working with a realtor?
  - Can't pay more than FMV
  - Quick Closing
  - Minimal Contingencies
- Letter of Intent





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