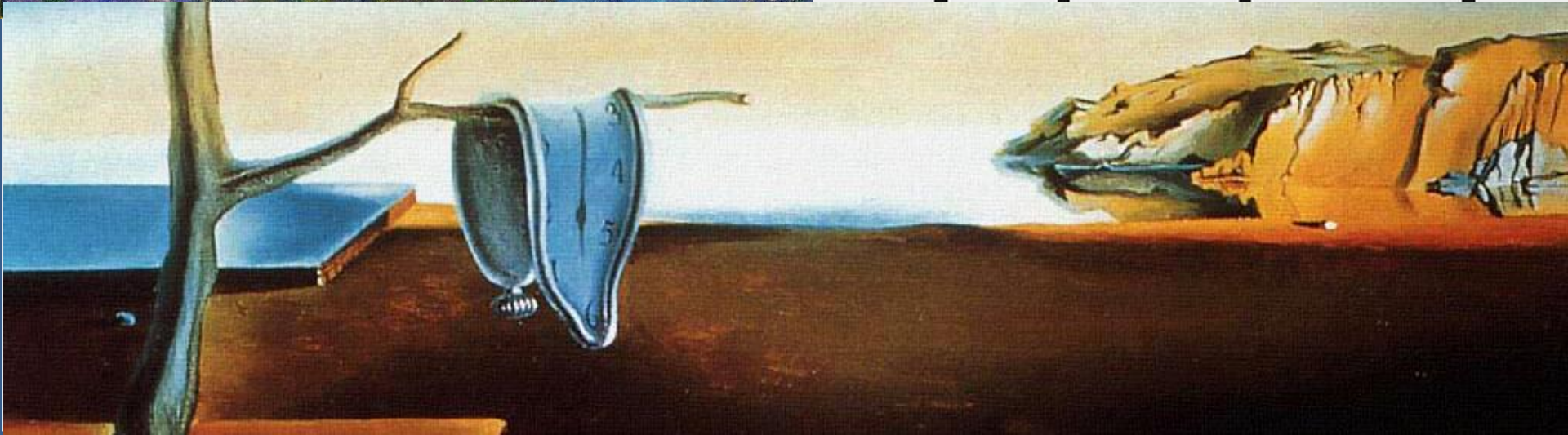
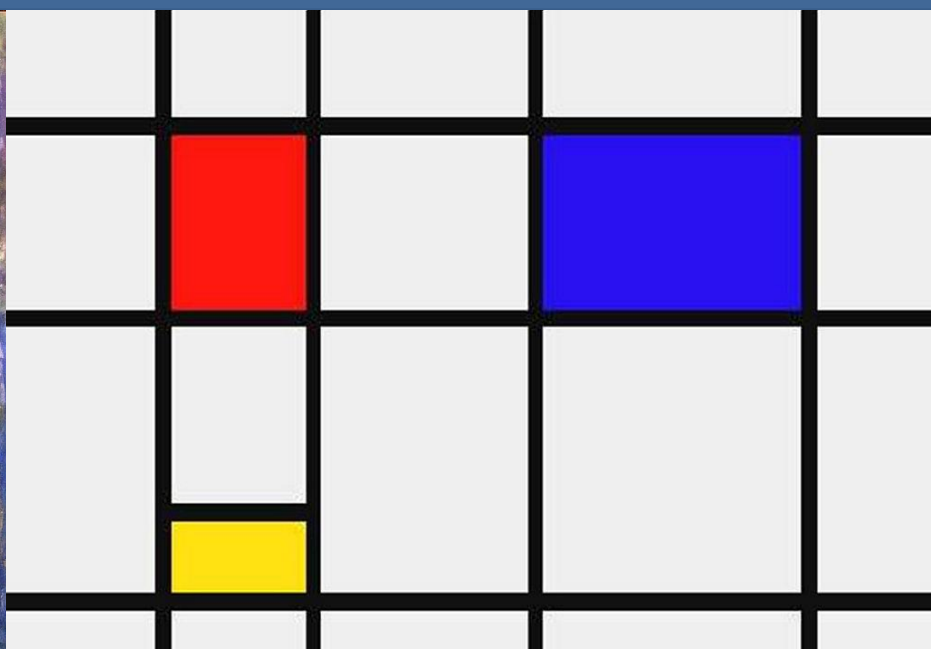


THE
CONSERVATION FUND



“Knowing When To Say No!”

Rhode Island Land & Water Summit 2016



Conserving Land Strategically

GEOGRAPHY	STRATEGIC CONSERVATION PLAN?	NUMBER OF ORGANIZATIONS	AVERAGE ACRES CONSERVED
Entire US	Yes	564	16,051
	No	240	8,203
Midwest	Yes	95	7,210
	No	42	2,865
Northeast	Yes	258	9,122
	No	116	7,832
Northwest	Yes	51	39,280
	No	14	5,596
Pacific	Yes	63	22,820
	No	12	5,762
Southeast	Yes	63	20,800
	No	29	9,228
Southwest	Yes	34	37,143
	No	27	19,437

- Landowner contact
- Site Inspection/Conservation Values ID
- Mission Fit
- Public Benefit/IRS compliance
- Written Selection Criteria
- Plan to complete project
- Board Approval



- Won't reinvent the wheel
- Consistency & Transparency
- Provide focus
- Flag potential problems





- Doesn't fit mission
- Zero Public Benefit
- Oppressive Stewardship Burden
- Financial Burden
- Others?

- High Cost
- Weak Public Benefit
- Surrounding Impacts
- Stewardship Issues
- Reserved Rights or Restrictions
- Reasonable Effort
- Liability Issues
- Better group fit
- PR, Legal or Ethical Impacts
- Administrative Burden



We will review a series of projects that I am bringing before YOU, our Committee.

These are simple cases, and more information would always be required so think about basic selection criteria and your gut instinct.

Our organization was founded 15 years ago to conserve our county's natural heritage and we've completed 10 projects protecting 15 acres. The land use in the county is predominantly agricultural and we've been approached by a farmer wanting to donate a conservation easement to protect her farm that has prime farm soils, woodlands and extensive riparian frontage.

We've been approached by the landowner of the #2 priority tract according to our strategic conservation plan. They are ready to sell and at a bargain sale! There isn't a lot of public grant money available in our region and while we've fund raised in the past, we would need to raise twice as much money as we've previously done.

Amazing opportunity! The long time owners of a huge undeveloped tract on the edge of town want to donate a conservation easement and have even offered to provide some stewardship funds. Unfortunately, the property is surrounded on three side by residential developments and thus has more than 300 neighbors.

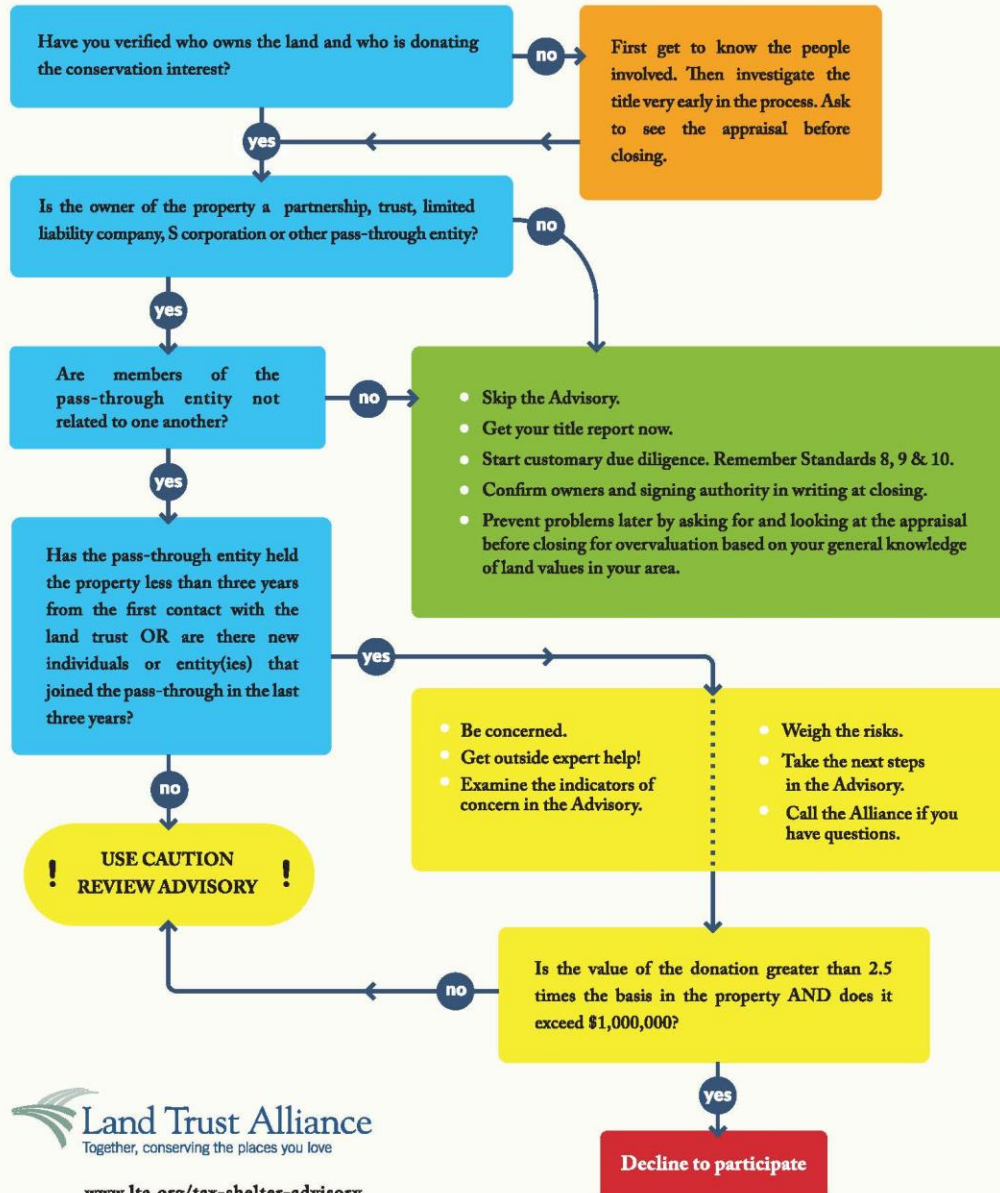
We're an urban land trust in Providence. There's an amazing patch of open space downtown that personifies relief from urban closeness and the harmonious juxtaposition of shapes and patterns. Unfortunately, the property is a very successful private golf course where many of your members play.

A very well heeled family has now come to us wanting to conserve their family's summer retreat. The property is comprised of numerous contiguous parcels and is actually owned by Family Summer Retreat LLC. They've heard about conservation easements, have spoken with their financial advisors from out of state and want to claim their millions in tax benefits. They even offered to bring by the 8283 form for you to sign.

Do you need to use the tax shelter advisory?

Find out if it applies to your transaction. It's easy!

LTA Advisory





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