



Land Trust Standards and Practices Revisions Process Update

Rhode Island Land & Water Conservation Summit
March 19, 2016

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Purpose of Today's Session

- Overview of Standards and Practices (S&P) revisions process
- Approach and use of S&P discussion draft
- Land trust community participation process
- Hearing from You!
 - High-level feedback on the S&P discussion draft

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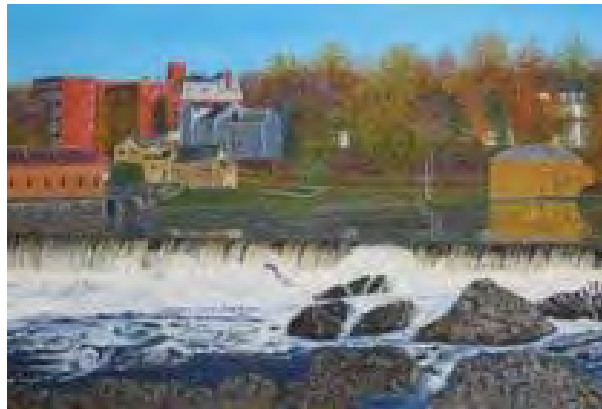
“I am dressed for success! Of course, my idea of success may not be exactly the same as yours.”



Aquidneck
Land Trust



Lowell Parks & Conservation Trust



Land Trust Standards & Practices

- Together, land trusts have established a set of guidelines for how to run a land trust responsibly
- Legal & ethical guidelines for serving in the public interest = *best business practices*
- S&P first developed in 1989; last revised in 2004
- New revisions are in progress
 - 1,300 land trusts have adopted S&P
 - 342 accredited land trusts in 44 states
 - > 75% of land conserved by the land trust community (15 million acres)

- 
- Increase the **PACE** of conservation
 - Enhance the **QUALITY** of conservation
 - Ensure the **PERMANENCE** of conservation

Introductory Discussion

- What is the single biggest challenge you are facing?
- Where can Standards provide clearer guidance?



Goals of 2016-17 Revisions Process

- Engage all land trusts with work of pursuing excellence and continuous improvement
- Make S&P accessible for entire land trust community
- Update to reflect changes in legal and operational environment
- Ensure alignment with accreditation, Terrafirma and other resources and tools

Overview of Process

- Roles of various stakeholders
 - Land Trust Alliance
 - Land Trust Accreditation Commission
 - Standards Advisory Team
 - Greater land trust community
- Work completed to date
 - Where we are in the process

Projected Timing	Tasks
Fall 2015	<ul style="list-style-type: none"> • Board approval of final plan • Announce process • Preparation of S&P discussion draft
January 2016	<ul style="list-style-type: none"> • Board approval of SAT
Winter 2016	<ul style="list-style-type: none"> • SAT starts its work • S&P discussion draft released for high-level feedback • Preparation for spring dialogues
Spring-summer 2016	<ul style="list-style-type: none"> • Community participation process <ul style="list-style-type: none"> • In-person and online
Fall 2016	<ul style="list-style-type: none"> • Synthesis of results • More public input, if necessary • Final draft prepared
February or June 2017	<ul style="list-style-type: none"> • Board approval of revised S&P • Implementation phase begins

S&P Discussion Draft

- 12-standard framework is essentially sound
- More readable and streamlined document
 - Focus on practices that apply broadly to land trust community
 - Improve clarity, reduce redundancy
 - Organize the practices into elements
- Design as online resource
 - Clearly highlight those items that lead to accreditation
 - Link to Alliance resources, narratives and requirements

New Framework!

- Current approach

5B. Accountability to Donors. The land trust is accountable to its donors and provides written acknowledgement of gifts as required by law, ensures that donor funds are used as specified, keeps accurate records, honors donor privacy concerns and advises donors to seek independent legal and financial advice for substantial gifts.

- Fresh approach

B. Accountability to Donors

1. Provide accurate and truthful solicitation materials and other communications to donors and the public
2. Classify all funds as unrestricted, temporarily restricted or permanently restricted as identified in written communications with, or as directed in writing by, the donor
3. Provide timely written acknowledgment of all gifts, including land and conservation easements, as required by law
4. Comply with the donor's written restrictions for all gifts
5. Have a written policy or procedure to ensure donor privacy concerns are honored

Community Input Process

- We want to hear from you!
- Input process runs through September 15th
- Land trusts can provide input in three ways
 1. In person at spring conferences and other sessions
 2. Online for detailed comments on each practice via Ethelo platform
 3. Via email at SandP@lta.org

3B Board Composition/Structure

Please indicate your level of support for the following elements related to Board Composition and Structure in relation to their importance to the land trust community. If you have no opinion, leave the ranking as "No Vote."

Preliminary accreditation indicator elements/requirements are shown in blue.

You can reference the current and tracked-changes version of Standard 3 and its associated practices [here](#). New practice elements are highlighted.

← BACK: 3a Board Responsibility

GENERAL INFO +

- Index
- INTRODUCTION
 - 3A BOARD RESPONSIBILITY
 - 3B BOARD COMPOSITION/STRUCTURE
 - 3C BOARD GOVERNANCE
 - 3D TRANSACTION APPROVAL
 - 4A CONFLICTS OF INTEREST
 - WEIGH PRIORITIES
 - RESULTS

NEXT: 3c Board Governance →

1. BOARD SIZE

Neutral

Have a board of sufficient size, consisting of at least five voting members, to conduct its work effectively.

mpavlas 3-

February 23 at 12:54pm · Like · Reply

Is there a way to strengthen or clarify this element? If you oppose it, please help us understand why.

COMMENTS

Connie Manes I like that when you click the "here" to get to the current/tracked text it opens up a new window, so you can go back and forth while making your comments. We might want to suggest in the intro that folks do this, or is there some way that we could have that text available in a small screen-in-screen next to the questions, like this box is next to the questions?

February 12 at 5:58pm · 1 Like · Reply

Write a comment...

2. DIVERSITY

Moderately Support

Have a board of substantially independent members with diverse skills, backgrounds and experiences

Connie Manes "substantially independent" could use defining. Calling this element "Diversity" might be misleading

February 12 at 5:59pm · 2 Likes · Reply

Is there a way to strengthen or clarify this element? If you oppose it, please help us understand why.

Discussion & Questions



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Rebecca Washburn - Northeast Conservation Manager, Land Trust Alliance
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Comments to: SandP@lta.org



Ethelo
landtrustalliance.org

EVENTS & WEBINARS

 <p>CONFERENCE</p> <p>OCTOBER 28 - 30, 2016 Rally 2016: The National Land Conservation Conference</p>	<p>WEDNESDAY</p> <p>MARCH 30, 2016 Stewardship Technology Update</p>	<p>WEDNESDAY</p> <p>MARCH 31, 2016 Thorny Acquisition Issues</p>
	<p>WEDNESDAY</p> <p>APRIL 20, 2016 Direct Mail Done Right</p>	<p>WEDNESDAY</p> <p>APRIL 21, 2016 Standards and Practices Revisions: Your Input Wanted!</p>



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WHY CONSERVE LAND WHAT WE DO WHAT YOU CAN DO ISSUES & ACTION FOR LAND TRUSTS

for land trusts

Standards and Practices Revisions: Your Input Wanted!



April 21, 2016

Time: 2:00-3:00 p.m. Eastern

Instructor(s): Sylvia Bates and Ginny Moore

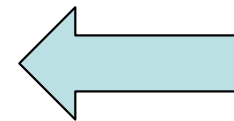
Cost: Complimentary

[Register online](#) #

We're revising the ground rules for land trusts and we need your two cents on what they say. The Land Trust Alliance is leading a collaborative process to revise *Land Trust Standards and Practices* to reflect the realities of land trust work today and to better align them with land trust accreditation, TerraFirma and the wide array of resources supporting best practices for land trusts. This webinar will discuss the revisions process and collect high-level feedback on an initial draft. Participants are encouraged to download the *S&P Discussion Draft* from the Alliance website in advance.

If you can't attend the live webinar, we will make the recording available for you to review. We also have a detailed online input process. For more information, see our [webpage](#).

Webinar – April 21, 2pm



JOIN US Together we will advance change and increase impact for land conservation.

[DONATE](#)

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STAY INFORMED

for land trusts

Adopt Standards and Practices

Implement Standards and Practices

Standards and Practices Curriculum

Standards and Practices Revision

Standards Advisory Team

Standards and Practices Revision

2016-2017 *Land Trust Standards and Practices* Revisions Process

The Land Trust Alliance first developed *Land Trust Standards and Practices* (Standards and Practices) in 1993. The Land Trust Alliance first developed *Land Trust Standards and Practices* (Standards and Practices) in 1993. Practitioners who believe a strong land trust community depends on the credibility and effectiveness of all understand that employing best practices is the surest way to lasting conservation. The Alliance led a process to revise *Standards and Practices* in 1993, 2001 and 2004 to reflect changes in land trust practices and regulations organizations. Since that time, the land trust community has made great strides securing public confidence: stronger, better managed and more effective than ever. More than 1,100 land trusts have adopted Land Trust reflecting an ongoing commitment to continuous improvement across the community.

Starting in 2016 and continuing into 2017, the Alliance will lead a collaborative process to revise Land Trust. This process will reflect changes in the legal and operational environment of the land trust community over the past 10 years, alignment with the Land Trust Accreditation Program, TerraFirma and the wide array of resources and documents for land trusts. By engaging the entire land trust community, the revisions process will also strive to provide support for Standards and Practices and to encourage all land trusts to implement them.

Revision Goals

The Land Trust Alliance is leading a process to work directly with the land trust community to revise *Land Trust Standards and Practices*. The goals of the process are to:

- Update Standards and Practices to reflect changes over the past decade in the legal and operational environment of the land trust community.
- Build greater awareness and support for Standards and Practices.
- Encourage all land trusts to use Standards and Practices as a foundation for their work.
- Ensure overall alignment of Standards and Practices with the Land Trust Accreditation Program, TerraFirma and the wide array of resources and documents supporting best practices for land trusts.

Opportunities for Engagement

Join the Discussion

The Land Trust Alliance invites you to comment on the Standards and Practices revisions. All input will be given full consideration. The community participation phase will run through approximately September 15.

View the [Discussion Draft](#), the potential changes proposed by the Alliance, the Commission and the Standards Advisory Team.

View the [Rationale Document](#), a practice-by-practice explanation of the reasoning behind the changes.

Standards 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12

You can provide input in three ways:

- **In-person:** Attend a spring conference (see [schedule](#)), other scheduled dialogue or April 21 webinar (register online)
- **Online:** Submit detailed comments on each practice via the Ethelo platform (expected to launch mid-March)
- **Email:** Contact us at SandP@lta.org

Standards Advisory Team

The revisions process is managed by a core team from the Alliance and Commission and is advised by the Standards Advisory Team, a team of land trust representatives that reflects the diversity of Alliance member land trusts. The Advisory Team consists of 14 members from the land trust community.

Projected Timeline

Task	Timing
Land Trust Alliance board of directors review and approval of Standards Advisory Team slate	January 2016 COMPLETE
Initial in-person meeting of the Standards Advisory Team	February 17-19, 2016 COMPLETE

TOPICS

- Accreditation
- Attorneys
- Boards
- Climate Change
- Collaboration
- Communications
- Community Conservation
- Conservation Defense
- Federal Programs
- Fundraising
- Insurance
- Standards and Practices
- Stewardship
- Strategic Conservation
- Taxes

Thank You. Please keep in touch!



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(978) 934-0030 jcalvin@lowelllandtrust.org

Rebecca Washburn - Northeast Conservation Manager, Land Trust Alliance
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Comments to: SandP@lta.org

<http://standards-practices-revisions.ethelodecisions.com/projects/56d9ecae70726f3333d40000/vote/project/login/welcome>