Alberta Land Trust Community Meeting
December 1, 2011, Red Deer, Alberta

Summary Report

Prepared for the
Alberta Land Trust Community

FINAL REPORT  January 2012

Guy Greenaway and Kimberly Good
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INTRODUCTION

In the fall of 2011, the Miistakis Institute undertook a process to bring the Alberta land trust community together for a meeting to discuss and map the future of Alberta’s land trust community. This document is the summary record of that process.

Working with the Alberta Land Trust Alliance, Miistakis developed an interview and workshop process, culminating in a meeting in Red Deer, Alberta on December 1, 2011. All active land trusts in Alberta were contacted prior to the meeting by Miistakis and asked if they would participate in the meeting. They were also interviewed (regardless of their ability to attend the meeting), and asked three basic questions:

1. Who do you see as members of the land trust community?
2. What challenges do you see facing the land trust community?
3. What opportunities do you see for the land trust community?

The results of these questions were presented back at the December 1 meeting, and became the basis of the discussion.

The meeting began with a context setting piece, where Miistakis briefly summarized the historical, policy and financial context of Alberta’s land trust work. Two exercises on the “Challenges” and on the “Opportunities” followed, where the interview information was presented, and participants in the meeting made additions as deemed appropriate.

The afternoon consisted of a somewhat-truncated exercise of mapping the opportunities to the challenges, where the plenary group suggested strategies that would use the opportunities to address the challenges.

The final step was to prioritize the suggested strategies. Participants were given summaries of the strategies from the 2006 Land Trust Leadership Project (which catalyzed the creation of the Alberta Land Trust Alliance), and the 2006 Alberta Land Trust Alliance Business Plan (those summaries are appended to this document) for information purposes.

Strategies were prioritized at the meeting with a ‘dotmocracy’ exercise, where participants were given three adhesive dots to place on the strategy(s) they deemed should be pursued most immediately. Their determination was based on their assessment of both the importance of the strategy and the potential for ‘quick wins.’

The top three strategies were as follows:

1. “Revisit goal of having “one voice” for community”
2. “Land trusts to clearly articulate how they can help Government of Alberta achieve land use goals”
3. “Strategy for common front for property rights task force (appoint someone?)”
The suggestions as to who would be the lead on these tasks focused on the Alberta Land Trust Alliance, and also on the Land Stewardship Centre of Canada and the Miistakis Institute (see the detailed summary on page 14).

The role of this summary is to inform the next steps. There was considerable interest in moving forward together as a community on a number of issues. The task now for the Alberta land trust community is to:

- Verify the strategies to be undertaken immediately
- Task the individuals/organizations to pursue them
- Secure the resources needed to do so
- Identify the longer strategies of importance
- Identify the process/structure within the community to prioritize / resource longer term strategies
- Clarify the role of the Alberta Land Trust Alliance (as the main delivery organization identified in the prioritization exercise) and others in delivering on these strategies
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<th>Time</th>
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<th>Activities</th>
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| 9:30 – 9:45 | **Introductions**       | • Round table introductions  
|           |                          | • Meeting goals  
|           |                          | • Layout of the day                                                        |
| 9:45 – 10:15 | **Context setting**  | • Brief history of the land trust community in Alberta  
|           |                          | • Policy context  
|           |                          | • Economic context                                                        |
| 10:15 – 10:30 | **Break**               |                                                                             |
| 10:30 – 11:15 | **“Challenges”**     | • Presentation of interview feedback  
|           | **Exercise**            | • Discussion                                                                |
| 11:15 – 12:00 | **“Opportunities”**    | • Presentation of interview feedback  
|           | **Exercise**            | • Discussion                                                                |
| 12:00 – 1:00 | **Lunch**               |                                                                             |
| 1:00 – 2:00  | **Strategy Design**    | • Map the challenges to the opportunities  
|           |                          | • Develop explicit strategy ‘statements’  
|           |                          | • Prioritize the strategies                                                |
| 2:00 – 3:00  | **“Roles and Responsibilities”** | • Develop ‘job descriptions’ for strategies  
|           | **Exercise**            | • Identify entities/individuals suited to ‘jobs’                           |
| 3:00        | **Adjourn**             |                                                                             |
MEETING PURPOSE AND STRUCTURE

Purpose:
- A meeting to discuss and map the future of Alberta’s land trust community

Desired Destination
- As a community, we are more effective in conserving private land in Alberta

Expected Meeting Outcomes:
- Strategic compilation of the needs of the community
- Pragmatically prioritized go-forward plan
- Clearly articulated roles and responsibilities

Roles:
- Land trust participants – (and private land conservation practitioners) – contributors, mappers
- Miistakis Institute – discussion facilitator
- Alberta Land Trust Alliance – meeting host

Principles
- Respect
- Forward-looking; conscious of the past
- Pragmatic optimism
SETTING THE CONTEXT

• Based on what we were hearing as challenges / opportunities
• Truncated, but we still wanted to do this to have it “top of mind”
• All numbers are approximate, and based on subjective assessment by the Miistakis Institute

Land Trust Community
• About a dozen land trusts in Alberta; that number has been relatively steady for the last decade, but increased slightly
• Several municipalities hold CEs (about half a dozen actively acquiring CEs; City of Calgary has ~130)
• Significant discrepancies between large and small land trusts
  o Large are about 1/3 of the community, but hold 80-90% of the CEs
  o Main differences: 1) fund development capability, 2) access to government, 3) conservation capacity
• Have been four efforts to establish a land trust alliance in Alberta; one in 2006 was successful
• AENV Land Trust Leadership Project in 2006 catalyzed Alberta Land Trust Alliance in 2006; three-year grant and secondment
• Cooperation exists bilaterally on projects
• DU, NCC, AFGA, ACA have cooperative partnership

Private Land Conservation
• No. of CE’s have increased significantly: 466 on 73,840 ac in 2005; 1616 in 2011
• Role as an “acquisition” community decreasing relative to role as “stewardship” community
• Legal concerns around CEs becoming a barrier to CE use, especially for large land trusts
• Continues to be little coordinated land conservation planning (what exists is internal to organizations)

Policy
• CE legislation in 1996 huge catalyst to Alberta land trust movement
• Land Use Framework makes significant mention of land trusts as delivery mechanism for framework
• Alberta Land Stewardship Act acquires CE legislation in 2009; expands to add agriculture
• Several tools (including market-based tools) created which depend on CEs
• Regional plans look to rely heavily on land trusts and municipalities for “implementation” of outcomes

Economy
• Environmental giving is low relative to other giving (2% to 4% for both individuals and corporations
• Environmental funding is project based (not the case in other sectors); core funding is rare
• Global economy tanked in 2008; philanthropic economy followed a year later
• Foundations funding environmental work saw reductions in endowments on the 20% to 40%; many closed their doors, many suspended granting; most are back on line, but all in a reduced capacity
• Government funding for environment in Canada/Alberta is very low relative to other funding (higher federal funding in Maritimes; higher provincial funding in Quebec, Ontario; prairies/Alberta is low; BC is slightly higher;
• Government funding and philanthropic funding are MUCH higher in the United States (population is 10x, but funding opportunities much greater than 10x)
• Government debt is the premiere global economic issue
LAND TRUST INTERVIEW RESULTS

*bullets in red are those added at the December 1, 2011 meeting; those in black were gathered in the pre-interview process*

Challenges

Collaboration
- Different objectives of partnering organizations can be confusing to landowners and partners
- More groups involved in a project the more complicated it can be
- Challenge to work together when some orgs have full time staff, others have part time and others have none

Government
- Federal
  - EcoGifts program targeted at donor, but no help for LTs re: costs
  - “Change of use” penalties in Eco-gift program have serious implications
- Provincial
  - GoA does not see the LTs as a community (e.g. the development of the Land Trust Grant program)
  - Not talking enough to land trust community
  - How do land trusts get involved in conservation tool conversations at government level
  - Land trusts could be delivery agents for provincial tools
  - Conservation and Stewardship implementation process died
- Municipal
  - Lack of consistent approach to property taxes on conversation lands between municipalities
  - Potential for fairly drastic swings in council opinion with respect to conservation at municipal level
  - Planners are looking to land trusts to solve issues they are not dealing with
  - Is concern about being involved with land trusts (seen as anti-development)
- All levels
  - Government decision-makers have low awareness of LTs

Funding
- Accessing grants and managing grants
- Necessary expertise (e.g. legal, appraisals, biophysical, etc) can be costly
- In general low levels of funding available and so there is competition for funds
- Inequality in fund-raising capacity between land trusts in particular less is accessible by smaller organizations
- Difficult raise securement funding and long term stewardship funding; have had to turn down projects because of lack of stewardship capacity
• Financial risk of CE’s being challenged is high

Conservation Program Delivery
• Technical aspects of conservation easements are complex and require specialized skill sets
  o E.g. baseline reports, appraisals, some kinds of monitoring
  o Need well-documented work that meets legal demands
• Work is long-term (i.e., CEs are in perpetuity)
  o Monitoring needs can outstrip human resources
• Balancing demand (available conservation projects) with supply (capacity)
• 15% for stewardship seems to be well-accepted by governments and funders but not necessarily valid

Conservation Planning
• How to prioritize with limited resources
• How to interrelate planning with the bigs and the smalls
• How to integrate bigger picture conservation planning with government initiatives such as LUF?
• How much land is enough?
• What are the gaps in current conservation efforts? How do we address these?

Community
• Inequities between land trust community members
• Large land trusts have internal capacity (fund-raising, securement, stewardship)
• Tendency to pursue projects individually
• Large land trusts have more difficulty seeing value in being part of the community; see more benefit for small groups to formally link
• Not enough land trust to meet landowner demand
• Difficult to start new land trusts due to challenges in fundraising, though the need is recognized
• Most collaboration is project specific
• May have organizational conservation goals but these are not shared; different goals for different organizations
• - no community goals
• Working more cooperatively is difficult because dealing with own challenges and may be some lack of trust
• Land trusts work with private land and private landowners to achieve private landowner goals however conservation provides a public benefit – difficult to define/understand the “public” role in making this work happen
• Whole province is not covered by land trusts – gaps in areas where project can occur
• Brad Stelfox message is good and shows problem – no link to how land trusts can help alleviate the problem
• “What is our plan? How does it address “the problem”?
• No clear / cohesive message
Why so many land trusts? – not easy to explain

- Could we identify a partner that can help message the value/benefit of land trust work?
- Urgency of ‘long-term’ work is low so other causes have priority

**Organizational**

- Need to be sustainable to be credible
- Membership is aging
- Bigs don’t understand the small
- Smalls don’t understand the bigs
- Small membership
- Very diverse – hard to find people with skill set
- Lack of public awareness

**Opportunities**

**Collaboration**

- Each land trust has unique skill sets and history
  - To build partnerships
  - Sharing information (nuts and bolts, expertise, track overall progress as a community – are we achieving real conservation on the ground?)
- Could lead to creation of more LTs
- Need umbrella to promote collaboration
  - Great opportunity for networking
- Partnerships
  - Can be project specific
  - Can reduce each indiv. org. costs for a specific project
  - Partnerships can be issue specific or programmatic
  - Able access different pools of volunteers for stewardship around the province based on organizations involved
- Sharing info/research/results on efforts e.g. learn more about what everyone does helps foster referrals,
  - Able to refer landowners to more appropriate group when understand what everyone else’s objectives are and what types of projects they do (e.g. allow public access, allow grazing, allow hunting)

**Government**

- Federal
  - Ecogift benefits for stewardship donations
- Provincial
  - Alignment with watershed protection as broader goal
  - ALSA recognizes importance of private land conservation
  - Identification of conservation easements in ALSA
  - Opportunities to educate GoA personnel re: private land conservation
CEs on public land that is sold (a la SK)

• Municipal
  o Encourage municipalities to include the environmental and conservation in their planning processes

Funding

• GoA land trust grant program
• Collective voice through alliance creates better opportunities for GoA funding
• Creativity in fundraising
• Tie dollar value to “benefit” conservation can do/save

Conservation Program delivery

• Ability for land trusts to learn technical aspects from each other
• Could pool biological/natural resource expertise
• Work together on legal defense
• Pool appraiser expertise

Conservation Planning

• Working together to address the “holes” in the province where there is no land trust

Community

• Recognize that success of one organization related to success of others
• Have had some really great successes, can build on these
• Older generation looking for help with succession planning
• Younger generation’s awareness of importance of conservation
• Connecting with local stewardship/watershed/naturalist groups

Organizational

• Each organization has own niche, if we all understood each other’s goals and objectives could figure out how to work together better
• Local land trusts are best to focus on “marketing”, education because they know their communities best
• Have open dialogue with communities
• Cross training volunteers / staff
### PRIORITIZED STRATEGIES

#### Summary

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<th>Category/Strategy</th>
<th>Votes</th>
<th>Potential responsibility</th>
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<td>5</td>
<td>ALTA Land Stewardship Centre of Canada Miistakis Institute</td>
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<tr>
<td>Develop consistent, shared, messages</td>
<td>4</td>
<td>ALTA + ad hoc committee</td>
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<tr>
<td>Supply land trusts with tools to link efforts to municipalities and vice versa</td>
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<td>ALTA</td>
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<td>Enhance relationship with municipalities; show benefit to municipalities of land trusts</td>
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<td>Province-wide raffle; split the funds between all land trusts</td>
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<td>Establish provincial goal for private land conservation (X acres by Y time)</td>
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<td>• Develop industry offset opportunities for land trusts</td>
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<td>• Promote land trust involvement in market-based tools</td>
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<td>• Investigate pooled legal fund for land trusts</td>
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| • Land trusts to clearly articulate how they can help Government of Alberta achieve land use goals | 5     | • ALTA (x2)  
• Land Stewardship Centre of Canada  
• Miistakis Institute |
<p>| <strong>Community</strong>                                          |       |                          |
| • Develop outcomes as a community                      |       |                          |
| • Develop outreach strategy re: value of conservation easements; identify audiences (landowners, estate planners, etc.) | 1     | •                        |</p>
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<td>• Utilize professionals in parks system to train land trust people</td>
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<td>• Develop “work experience” program</td>
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<td>• Create clearing house of stewardship activity</td>
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Strategies summary
  • A summary of the strategies from the 2006 Land Trust Leadership Project, the 2006 ALTA Business Plan, and the 2009 ALTA Strategic Communications Plan: Strategies and Actions. This was circulated at the December 1, 2011 meeting.

Strategy ‘job description’
  • The job description worksheet intended to be used at the December 1, 2011 meeting; the intention being to identify the type of person/organization who should take on each strategy, then identify who fit the description (time constraints prevented it being used).

Land Trust Leadership Project summary
  • Alberta Environment initiated the Land Trust Leadership Project in 2006. The gathering of the active land trusts in Alberta identified the strategies to pursue to promote private land conservation. The number one priority was the creation of an alliance, leading to the creation of the Alberta Land Trust Alliance.

ALTA Business Plan
  • At the inception of the Alberta Land Trust Alliance, a business plan was created outlining the tasks to be undertaken with the $300,000 Alberta Environment grant and secondment of a Project Coordinator.
Strategies and Recommendations for the Land Trust Community

Land Trust Leadership Project (August 2006)

6.1 Recommendations: Immediate actions

1. Secure funding for a provincial land trust alliance and facilitate its creation, which may include defining a framework, recruiting and announcing a board, developing a web site, and launching the initiative.

2. Support a province-wide conference for land trusts, as a starting point for a land trust alliance and including the education and promotion of conservation easements.

3. Create a strategy to achieve significant, long-term endowment funding to support the work of land trusts and specifically provide the capability to purchase or subsidize the purchase of conservation easements or land for conservation purposes.

4. Create an On-going Stewardship Grant Program to provide funding to land trusts to assist with the monitoring and maintenance of conservation easements, based on a percentage of market value per acre or a set amount, for example, $25 per acre.

5. Create an assistance program to fund transaction costs for the donation or purchase of title of conservation easements involving ecologically significant lands. Eligible costs could include appraisal, survey, legal, and environmental assessment costs.

6. Create a strategy for increasing and improving the use of conservation easements, including planning and prioritization.

7. Partner with the Minister and staff of Alberta Environment to develop awareness and internal capacity with respect to land trusts and conservation easements so they can support and promote them.

8. Link conservation easements with other environmental priorities like the Land Use Framework and Water for Life Strategy, including providing a seat at the Land Trust Framework table for land trusts and those interested in conservation easements.

6.2 Recommendations: Longer term and/or cross-ministry actions

1. Modify the municipal approach to conservation easements by providing clearer assessment rules that do not discourage their use and consider providing grants in-lieu of property taxes to municipalities.

2. Ensure access to important GIS information to help land trusts plan and coordinate their activities, including the securement and management of conservation easements.

3. Develop and launch an awareness campaign to inform the public about land trusts and conservation easements, supported by a more targeted education and marketing campaign for practitioners and professionals who would benefit from more knowledge about conservation easements.

4. Investigate the use of innovative new approaches like transferable development credits to assist land conservation by providing better incentives to landowners.

5. Investigate the use of water trusts as a conservation tool and, if appropriate, modify the Water Act to allow in-stream water rights to be transferred to conservation organizations.

6. Promote better coordination and management of conservation easements with surrounding land uses, in recognition of an integrated approach to land conservation. This may include better integration of conservation easements with surface access and disturbance issues related to oil and gas development or protecting adjacent public lands to ensure ecologically integrity and viability.

7. Provide awards and recognition for projects that conserve land, particularly the use of conservation easements.
1.1 Develop and implement a suitable organizational structure for the ALTA.  
**Deliverable:** An incorporated and operational Alliance.

1.2 Plan and host a provincial land trust conference to provide an opportunity for information sharing between land trusts and the public.  
**Deliverable:** A successful provincial land trust conference.

2.1 Develop a strategy for the implementation of the Canadian Land Trust Alliance’s Standards and Practices in all of Alberta’s land trusts.  
**Deliverable:** An implementation strategy for the CLTA’s Standards and Practices.

2.2 Enhance information sharing within the land trust community and with its partners through the development of an informational web site.  
**Deliverable:** A comprehensive ALTA website.

3.1 Establish the ALTA as a comprehensive information source regarding land trusts by providing landowners and others information regarding the nature and activities of Alberta land trusts.  
**Deliverable:** Useful information available to landowners via the ALTA website.

3.2 Direct landowners interested in donating their land for conservation purposes to an appropriate land trust.  
**Deliverable:** Clearing house function for all public requests for conservation easement and fee simple options.

4.1 Partner with the Minister and staff of Alberta Environment to develop awareness and internal capacity with respect to land trusts and conservation easements so they can support and promote their use.  
**Deliverable:** Information materials on land trusts provided to Alberta Environment.

4.2 Work with municipalities to enhance their use of conservation easements in land conservation planning and develop partnerships for promoting land conservation at the local level.  
**Deliverable:** Strategy for improved incorporation of conservation easements at municipal level.

4.3 Work with the Government of Alberta to link conservation easements with other environmental priorities such as the Water for Life Strategy, Clean Air Strategic Alliance and the Land Use Framework.  
**Deliverable:** Land trusts are recognized as a primary conservation option within the implementation strategies of complementary provincial environmental initiatives.

5.1 Identify where conservation properties and willing landowners have been unable to find a suitable conservation option because of incomplete land trust coverage.  
**Deliverable:** Gap analysis of land trust activity in Alberta.

5.2 Promote cooperative strategic conservation planning and mapping within the land trust community.  
**Deliverable:** Facilitation of cooperative conservation planning activities.

6.1 Create a strategy to achieve significant, long-term endowment funding to support the easement and land acquisition work of land trusts.  
**Deliverable:** Effective strategy developed for land conservation fund securement and distribution.

6.2 Define relevant performance measures and indicators that will be used to evaluate progress in land conservation across the province.  
**Deliverable:** Performance measures agreed upon by ALTA members.
Educate and work with existing and potential new Land Trusts to encourage use of best practices and ensure sustainability:

- Templates for policies and procedures, appropriate accounting procedures, information brochure, individual websites, media releases
- Standards and practices (from Canadian Land Trust Alliance) Fact Sheets
- Workshops/Conferences: focus sessions on working with landowners, working with municipalities, fund development, communications, media training and others as identified
- Fund development documents such as a case for support
- Website links to current information/Really Simple Syndication (RSS) feeds/discussion boards
- Members only site (i.e. SharePoint)
- Referral service: become fully aware of each Land Trust’s capacity, interests and contact information to ensure appropriate referrals for interested landowners and/or donors
- Networking opportunities Assisting in the creation of new Land Trusts where there are gaps in service

Increase awareness and a better understanding of Land Trusts and the conservation tools they use:

- Develop key messages Develop and keep current a comprehensive database
- Develop or create links to communications materials that explain, in simple terms: land conservation, the role of Land Trusts, conservation tools and market-based initiatives for private landowners
- Host information sessions across the province
- Implement a media relations strategy: i.e. story bank of successes and milestones, media contact list, template releases, Alberta Weekly Newspaper Association membership, provide stories for environment week supplements
- Media training for ALTA and individual Land Trust spokespeople E-newsletters Create templates for presentations and training
- Public section of ALTA’s website is easy to navigate and understand, includes links to existing Land Trusts and appears on the first page of results on most commonly used search engines
- Create and distribute media releases around policy issues

Position ALTA as a valuable information resource for provincial and municipal governments as they develop policies and programs to support effective private land conservation:

- Keep website current with regular updates
- Pro-actively develop position papers and disseminate to individuals and departments through the appropriate channels
- Respond quickly and professionally to requests for information
- Develop a “champions” program including government departments involved with the Land-use Framework: Alberta Environment; Alberta Energy; Alberta Sustainable Resource Development; Alberta Municipal Affairs; Alberta Agriculture and Rural Development; Alberta Culture and Community Spirit; Alberta Tourism, Parks and Recreation; and Alberta Aboriginal Relations
- Invite provincial government officials to participate in conferences, workshops and ALTA’s AGM
- Recruit government representatives as advisors on select committees
- Work with Alberta Urban Municipalities Association, the Alberta Association of Municipal Districts and Counties, the Alberta Development Officers Association and the Urban Development Institute to educate and inform municipal officials and developers re. ALTA’s role and its resources
- Work closely with the Land-use Framework Secretariat and the Land-use Regional Advisory Councils to limit duplication of services and work (i.e. mapping conserved land)
Stakeholders are confident that the Land Trust community in Alberta is stable, credible and sustainable.

- Annual General Meeting and annual report
- Recognize donors and corporate partners on behalf of ALTA and its members
- Develop and share a story bank of successes and milestones
- Build the database through Board, member and staff contacts, relevant association and NGO newsletters
- Communications materials are professionally prepared, easy to understand and up-to-date
- Include list of ALTA members on letterhead to demonstrate common goals of all Alberta Land Trusts and the power of the Alliance as a single voice
- ALTA staff are “experts” on individual Land Trusts and their capacity/interest to respond in any given situation
- Provide template “contact sheets” for both ALTA and Land Trusts to track contacts with landowners, ensure appropriate cultivation and follow up and plan for closure
- Establish a recognizable and consistent visual identity for ALTA
Job Description – Land Trust Community Task

Job:

Necessary skills, capabilities:

Required capacity:

Resources required:

Potential candidates:
  • organization, agency, individual; may be more than one; existing or not
Land Trust Leadership Project

Recommendations Report

Alberta Environment

August 3, 2006
4.1  **Strengths and Challenges: Challenges**

- Education and awareness about conservation easements is generally poor for municipalities, related professionals and the general public.
- The initial perception of many, including many municipalities, is that conservation easements may negatively affect land values and limit development options.
- There are differing perceptions of what constitutes value, leading to varying appraisals for the same or similar land. A market value-based approach to tax assessment does not generally support the conservation of land.
- Urban municipalities in particular find it difficult to use the conservation easement tool, largely because land values are high and rising, making it less desirable for landowners to donate.
- The growing spread between speculative and natural value is requiring that municipalities, agencies and organizations consider partial or full purchase of land if they want to conserve it.
- Many municipalities do not know what land in their jurisdiction is covered by a conservation easement or the potential use of conservation easements.
- Many municipalities, landowners and some land trusts are concerned about the management of conservation easements. Since it is a flexible tool that allows for varying terms and conditions, the diversity can be difficult and time consuming to manage.
- Employing the conservation easement tool is often time consuming and requires a lot of effort by private landowners. There are limited incentives for landowner to enter into a conservation easement.
- The relationship between sub-surface rights and conservation easements can be contradictory and detrimental to land conservation.
- Conservation easements are a relatively new tool and questions of consistency and longevity have yet to be answered.
- Since conservation easements are a private, voluntary tool, they do not cover all parts of the province.
- The cost of conserving land using a conservation easement is paid by the individual landowner and land trust, even though it is a public good.
5.0 Action Areas

*Capacity building for land trusts* - Land trusts, particularly smaller ones, require consistent operational funding to administer conservation easements. The appraisal, legal, monitoring and enforcement costs can be prohibitive. Secure funding is required to help them manage risk. Asking land trusts what they need to build their capacity to manage and monitor conservation easements would be a good first step.

*Education* – Many landowners, municipalities, related professionals and the general public do not understand the conservation easement tool and how to apply it. Education on many levels and directed at many groups is clearly an area for action. The Government of Alberta could be a leader in building knowledge. Education could happen through an awareness campaign, municipal workshops and post-secondary courses for professionals, possibly leading to certification. Most importantly, education is required to integrate the use of conservation easements in land use planning and to provide clarity and consistency to the use of conservation easements by municipalities, land trusts and landowners.

*Information sharing* – Land conservation and the use of conservation easements could be immediately enhanced through better information sharing. For example, creation of a web site that has information on the definition and process for conservation easements, qualified and interested agencies, experienced lawyers and financial planners, and a tax benefit calculator. Better information would also allow for better province-wide coordination and prioritization. Municipalities could share information and expertise. Of particular concern is GIS data, which is very valuable to land trusts for applying tools like conservation easements. The fees for obtaining this data can be prohibitive. The Government of Alberta has easy access to the data and could provide it free to land trusts without incurring unreasonable costs.

*Land Securement Assistance Program* – Modeled on a program in Ontario, this would provide grants for land securement costs for donations or purchase of title of conservation easements involving ecologically significant lands. Eligible securement costs could include appraisal, survey, legal, and environmental assessment costs. The requirement to purchase land is becoming more common as land values increase. Ideally, funding could be provided through a significant endowment fund that creates a lasting legacy of land conservation.

*Land trust alliance* – Land trusts and the use of conservation easements would benefit from a more organized, networked and coordinated provincial land trust organization. The Government of Alberta could encourage the development of a land trust coordinating body, similar to those in other provinces. One of the initial steps could be a provincial conference, sponsored jointly with a municipality (Strathcona County has offered to jointly host a conference next year). This would provide a starting point for better information sharing between land trusts and providing information to the public. The conference would focus on knowledge sharing, coordination, possibly collaborative conservation planning, and celebrating successes. The alliance could provide leadership, marketing, capacity building, research, information sharing and province-wide coverage.

*Links to other environmental priorities* – The use of conservation easements could be enhanced if they are put into context as part of the broader goal of land conservation and linked to stated environmental priorities like Water for Life, Climate Change Central, Clean Air Strategic Alliance, and the Land Use Framework. The Government of Alberta and municipalities could promote and improve the use of conservation easements by employing the tool themselves to conserve land; for example, by identifying and protecting important wildlife corridors. They could also support conservation easements by encouraging that adjoining crown lands are also considered for easements, which would help to ensure that conserved lands do not become unsustainable “islands”.
Marketing and promotion – The use of conservation easements would improve if they were marketed and promoted better. The Government of Alberta could spearhead a broad campaign to promote awareness and understanding of the conservation easement tool. It needs to be characterized as a partnership and as part of an approach to land based management that recognizes the true value of land. This would involve reaching out to land trusts, municipalities, landowners and other stakeholders. More broadly, the goal would be to encourage a change in thinking towards the importance of conservation.

Political support – Demonstrated political support for land trusts and conservation easements would enhance their use. This can be done through education of all levels of government, showing leadership and commitment, and identifying conservation easements as an important tool within the Land Use Framework. Alberta Environment staff and others would benefit from actually seeing a conservation easement. This would put the tool into context and improve the discussion regarding changes, improvements and application.

Property taxes – Many municipalities are not active in the use of conservation easements because they anticipate a loss of tax revenue or economic “sterilization” of the land. Municipalities should be encouraged in the greater use of easements, and the approach to assessment made simpler, fairer and more consistent. The Government of Alberta could take the lead in clarifying an approach to conservation easements, by providing clearer rules for how various lands could be assessed to encourage conservation. Currently, all non-agricultural land must be assessed at market value, which is a disincentive for using conservation easements. Grants to municipalities in-lieu of property taxes that are reduced because of conservation easements could also be very helpful.

Tools and incentives – Many landowners will consider conservation easements only if they are provided with a financial or economic incentive. The recent change to the application of the capital gains tax was a positive step forward, but it does not apply to the majority of landowners who have low income. Also, there are no incentives for land with little or no economic value. Transferable development credits are one way to provide this incentive. Alberta Environment could provide research and support for transferable development credits, which would be a longer term solution for private land conservation. Another option is density bonus credits. Tools also need to evolve to enable the conservation of prime agricultural lands, which are in short supply and particularly vulnerable to urban development.

Water Act – Amend the Water Act to allow for private in-stream water rights, which would require a regulatory amendment to clarify private in-stream water rights and enable water trusts for the purpose of conservation. This would support wetland policy and provide a link between water and land policy.
6.1 **Recommendations: Immediate actions**

1. Secure funding for a provincial land trust alliance and facilitate its creation, which may include defining a framework, recruiting and announcing a board, developing a web site, and launching the initiative.

2. Support a province-wide conference for land trusts, as a starting point for a land trust alliance and including the education and promotion of conservation easements.

3. Create a strategy to achieve significant, long-term endowment funding to support the work of land trusts and specifically provide the capability to purchase or subsidize the purchase of conservation easements or land for conservation purposes.

4. Create an On-going Stewardship Grant Program to provide funding to land trusts to assist with the monitoring and maintenance of conservation easements, based on a percentage of market value per acre or a set amount, for example, $25 per acre.

5. Create an assistance program to fund transaction costs for the donation or purchase of title of conservation easements involving ecologically significant lands. Eligible costs could include appraisal, survey, legal, and environmental assessment costs.

6. Create a strategy for increasing and improving the use of conservation easements, including planning and prioritization.

7. Partner with the Minister and staff of Alberta Environment to develop awareness and internal capacity with respect to land trusts and conservation easements so they can support and promote them.

8. Link conservation easements with other environmental priorities like the Land Use Framework and Water for Life Strategy, including providing a seat at the Land Trust Framework table for land trusts and those interested in conservation easements.

6.2 **Recommendations: Longer term and/or cross-ministry actions**

1. Modify the municipal approach to conservation easements by providing clearer assessment rules that do not discourage their use and consider providing grants in-lieu of property taxes to municipalities.

2. Ensure access to important GIS information to help land trusts plan and coordinate their activities, including the securement and management of conservation easements.

3. Develop and launch an awareness campaign to inform the public about land trusts and conservation easements, supported by a more targeted education and marketing campaign for practitioners and professionals who would benefit from more knowledge about conservation easements.

4. Investigate the use of innovative new approaches like transferable development credits to assist land conservation by providing better incentives to landowners.

5. Investigate the use of water trusts as a conservation tool and, if appropriate, modify the Water Act to allow in-stream water rights to be transferred to conservation organizations.

6. Promote better coordination and management of conservation easements with surrounding land uses, in recognition of an integrated approach to land conservation. This may include better integration of conservation easements with surface access and disturbance issues related to oil and gas development or protecting adjacent public lands to ensure ecologically integrity and viability.

7. Provide awards and recognition for projects that conserve land, particularly the use of conservation easements.
Alberta Land Trust Alliance

Business Plan

November 7, 2006
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I. Background Information  
(The role of land trusts and how this group came together)

Land Trusts in Alberta

Approximately one third of Alberta is privately held and managed land, yet this minority portion supports most of our food production, virtually all of our population, and a critical proportion of our ecological infrastructure, including almost 80 percent of our species at risk.

The competing pressures of land use and conservation are most acute on these lands. Alberta’s landowners see these issues firsthand and increasingly are seeking ways to conserve these important landscapes through personal action.

Land trusts are non-profit, charitable organizations that have as one of their core objectives the acquisition of land or interests in land (e.g., conservation easements) for the purpose of conservation. Those conservation lands may have ecological, cultural, agricultural, recreational, and/or historical value. Land trusts work with private landowners to help them realize their goals of protecting those landscape values for future generations.

The vitality of Alberta’s lands – their ecological processes, cultural fabric, and productive capability – depends heavily on the health of the private land base.

Currently in Alberta, land trust organizations are doing a good job of conserving land and using conservation easements, but many challenges still exist:

- Securement tools such as conservation easements are still underutilized;
- Private land conservation activity needs to be strategically coordinated within the land trust community, and with complementary conservation efforts;
- Awareness about conservation tools needs to be increased;
- Rising land values and speculation are making it less desirable for landowners to donate or become involved in land conservation programs;
- Employing conservation tools can be time consuming; and
- The costs incurred by a land trust in conserving land are significant.

The Land Trust Leadership Project

In 2006, Alberta Environment identified land trusts and conservation easements as important aspects of land conservation and initiated a Land Trust Leadership Project. The purpose of the project was to develop or improve province-wide tools to encourage the use of conservation easements as part of the voluntary conservation of private lands.

They first brought together a Small Advisory Group then a subsequent larger Land Trust Leadership Advisory Committee (LTLAC) to discuss potential “quick wins”. Input was combined and developed into a set of recommendations, which are outlined in the “Land Trust Leadership Project
Recommendations Report.” All land trusts active in the province were involved in the development of the recommendations, as were several municipalities and landowners.

One of the key recommendations from the Land Trust Leadership Project was the creation of a provincial land trust alliance because “land trusts and the use of conservation easements would benefit from a more organized, networked, and coordinated provincial land trust organization.” Land trust alliances exist in three other provinces (British Columbia, Ontario, and Quebec), and a national land trust alliance has also recently been incorporated. The LTLAC met again in Strathcona County on October 18, 2006 to discuss the idea of creating an Alberta Land Trust Alliance and what its role and objectives would be. The Alberta Land Trust Alliance was born at that meeting.

The creation of the Alberta Land Trust Alliance will help contribute to Alberta Environment’s Business Plan Goal of “Encouraging the use of stewardship endowments and trusts to support a high quality environment” by encouraging the conservation of land. The Alliance will increase collaboration, provide leadership, build land trust capacity, promote awareness about land conservation, and build policy development capacity in the land trust community. As a result, land conservation in Alberta will increase in quantity, quality, and sustainability for the future.

II. Business Plan

Vision

(The future we are striving to attain)

The members of the Alberta Land Trust Alliance (ALTA) are striving to conserve landscapes with natural or cultural significance so that the future of Alberta’s environment is rich in biodiversity and has strong ecological integrity.

Mission

(The role this organization plays in partnership with other stakeholders in achieving the vision)

The mission of the Alberta Land Trust Alliance is to increase the amount of land conserved by building capacity in Alberta’s land trust organizations and informing governments, landowners, industry and the public about land trusts and the benefits of land conservation.

Goals

(The outcomes that this organization will achieve)

Goal 1: ALTA increases the level of collaboration among Alberta’s land trusts and speaks as a unified voice on their behalf.

Short-term Strategies (1-2 years)

1.1 Develop and implement a suitable organizational structure for the ALTA.
**Deliverable:** An incorporated and operational Alliance.

1.2 Plan and host a provincial land trust conference to provide an opportunity for information sharing between land trusts and the public.

**Deliverable:** A successful provincial land trust conference.

Long-term Strategies (3-5 years)

1.3 Plan and host annual meetings of all Alberta land trust organizations.

1.4 Represent Alberta’s land trusts nationally and internationally.

**Rationale**

- Land trusts and the use of conservation easements would benefit from a more organized, networked and coordinated effort by Alberta land trust organizations.

**Goal 2:** Alberta land trusts have the capacity to operate effectively.

Short-term Strategies (1-2 years)

2.1 Develop a strategy for the implementation of the Canadian Land Trust Alliance’s Standards and Practices in all of Alberta’s land trusts.

**Deliverable:** An implementation strategy for the CLTA’s Standards and Practices.

2.2 Enhance information sharing within the land trust community and with its partners through the development of an informational web site.

**Deliverable:** A comprehensive ALTA website.

Long-term Strategies (3-5 years)

2.3 Establish a service centre with the ability to provide individual Alberta land trusts with professional, technical, financial, and administrative support.

2.4 Establish consistent monitoring mechanisms to ensure conservation commitments are being respected, and provincial and national standards maintained.

2.5 Develop an on-going grant or endowment program to provide funding to land trusts to assist with the monitoring and stewardship of conservation easements and properties.

**Rationale**

- The quality of land conservation in Alberta is directly dependent on the organizational capacity of Alberta’s land trusts.

- There is a need to share resources, knowledge, skills, and best management practices in order to support all land trusts and to ensure consistent performance.
Land trusts, particularly smaller organizations, require consistent operational support to acquire and administer conservation easements and fee simple properties, including appraisal, legal, monitoring, and enforcement.

**Goal 3:** Albertans are more aware of land trusts and have a better understanding of the conservation tools they use.

**Short-term Strategies (1-2 years)**

3.1 Establish the ALTA as a comprehensive information source regarding land trusts by providing landowners and others information regarding the nature and activities of Alberta land trusts.

**Deliverable:** Useful information available to landowners via the ALTA website.

3.2 Direct landowners interested in donating their land for conservation purposes to an appropriate land trust.

**Deliverable:** Clearing house function for all public requests for conservation easement and fee simple options.

**Long-term Strategies (3-5 years)**

3.3 Develop and launch an awareness campaign to inform landowners, professionals, practitioners and the public about land trusts and conservation easements.

**Rationale**

- Many land owners, municipalities, related professionals, and the general public do not understand the conservation easement tool and how to apply it.
- Until a more widespread understanding of this tool is achieved, land trusts will not be able to reach their full potential and the amount and quality of land being conserved will be less than optimal.

**Goal 4:** ALTA works with all levels of government in the development of policies supportive of effective land conservation.

**Short-term Strategies (1-2 years)**

4.1 Partner with the Minister and staff of Alberta Environment to develop awareness and internal capacity with respect to land trusts and conservation easements so they can support and promote their use.

**Deliverable:** Information materials on land trusts provided to Alberta Environment.

4.2 Work with municipalities to enhance their use of conservation easements in land conservation planning and develop partnerships for promoting land conservation at the local level.

**Deliverable:** Strategy for improved incorporation of conservation easements at municipal level.
4.3 Work with the Government of Alberta to link conservation easements with other environmental priorities such as the Water for Life Strategy, Clean Air Strategic Alliance and the Land Use Framework.  
**Deliverable:** Land trusts are recognized as a primary conservation option within the implementation strategies of complementary provincial environmental initiatives.

Long-term Strategies (3-5 years)

4.4 Promote policy incentives and new policy options proposed by the Land Trust Leadership Project Recommendations Report, including property tax incentives, water trusts, transfer of development credits, per-acre payments for conservation lands, and tools to address surface/sub-surface planning.

4.5 Regularly consult with all governments on issues relating to land conservation and protection.

**Rationale**

- Land trusts have a wealth of knowledge and experience from which governments can draw when making decisions and developing policies.
- Interactions between the Government of Alberta and land trusts will be facilitated by access to a single voice of the land conservation movement that is trusted, knowledgeable and credible.
- Municipalities can play a pivotal role in land conservation through planning, promotion and community contact.

**Goal 5:** The land trust community is maximally comprehensive in conserving valued landscapes and providing opportunities to landowners.

Short-term Strategies (1-2 years)

5.1 Identify where conservation properties and willing landowners have been unable to find a suitable conservation option because of incomplete land trust coverage.  
**Deliverable:** Gap analysis of land trust activity in Alberta.

5.2 Promote cooperative strategic conservation planning and mapping within the land trust community.

**Deliverable:** Facilitation of cooperative conservation planning activities.

Long-term Strategies (3-5 years)

5.3 Promote on-going research into knowledge gaps, barriers to delivery, and opportunities for new tools.

5.4 Facilitate the establishment of new land trusts to satisfy unmet geographic (regions) or thematic (ecological, agricultural, historical, etc.) needs.

**Rationale**
Land trusts and conservation easements are important aspects of land conservation.

Conservation easements are a relatively new tool and questions of consistency and longevity need to be addressed.

III. Governance

One of the key roles of the interim steering committee will be to formalize the governance structure of the Alberta Land Trust Alliance along the following guidelines.

Overview

The Alberta Land Trust Alliance will be incorporated as a not-for-profit corporation (under either the Societies Act or the Companies Act) with federal charitable status, governed by a volunteer board of directors. In the initial stage, a Program Manager will be hired and tasked with establishing the Alliance under the direction of the Board of Directors. Ultimately, the organization will be led at the operational level by an Executive Director.

Board of Directors
In the early stages of the establishment of ALTA, an Interim Steering Committee will be established by the participants in the Land Trust Leadership Project, to operate until such time as a Board of Directors is formed. This group will be responsible for recruiting a Program Manager, overseeing the implementation of the business plan, and for developing a succession plan for instituting a Board of Directors legally responsible for the organization.

The Board of Directors will be drawn from voting members, and will be uncompensated. The Board composition will be devised to broadly represent the land trust community and its cooperating partners. No reserved positions will be created at the outset, but internal policy will direct that the Board should seek to represent large land trusts, small land trusts, government, support/research members, and landowners with conservation easements.

**Fiscal Agent**

Until such time as the Alberta Land Trust Alliance is incorporated and organizationally capable, a fiscal agent will be identified to hold and manage any funds procured and expended by the Alliance.

The Land Stewardship Centre of Canada, based in Edmonton, has agreed to act as the fiscal agent for the Alliance. The Interim Steering Committee will provide direction to the Land Stewardship Centre regarding the disbursement and management of the funds, subject to the capabilities and mandate of the LSC.

**Membership**

A stratified membership structure will be developed that best serves the needs of the Alliance and the land trust community in Alberta. Voting membership will be available to land trusts, and to organizations, agencies and individuals directly involved in private land conservation. Associate (non-voting) memberships will be available to other partners, associated stakeholders and interested individuals. Fees will be based on the capacity of members.

**Staff**

Ultimately, the Alberta Land Trust Alliance will operate under the guidance of an Executive Director who reports directly to the Board of Directors. Additional staff may be added based on the need and capacity as the Alliance evolves. In the interim, a Program Manager will be recruited by the Steering Committee / Board of Directors responsible for administering the formation of the Alliance. This position may evolve into the Executive Director.

**IV. Budget**

The cost of executing this business plan over an initial three-year period is anticipated to breakdown as described below. The launch and initial operation of the Alberta Land Trust Alliance would be critically enhanced by an investment from Alberta Environment, and a secondment and office space from the Government of Alberta.
### Expenses ('000 dollars)

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<th>Year 3</th>
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### Revenues ('000 dollars)

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</thead>
<tbody>
<tr>
<td>Alberta Environment support</td>
<td>$100.0</td>
<td>$100.0</td>
<td>$100.0</td>
</tr>
<tr>
<td>Other government support</td>
<td>$42.0</td>
<td>$8.0</td>
<td>$8.0</td>
</tr>
<tr>
<td>Grants</td>
<td>$10.0</td>
<td>$20.0</td>
<td>$30.0</td>
</tr>
<tr>
<td>Donations</td>
<td>$5.0</td>
<td>$5.0</td>
<td>$5.0</td>
</tr>
<tr>
<td>Membership fees</td>
<td>$5.0</td>
<td>$5.0</td>
<td>$5.0</td>
</tr>
<tr>
<td>Fee for service</td>
<td>$0.0</td>
<td>$2.0</td>
<td>$5.0</td>
</tr>
<tr>
<td>In-kind (Government of Alberta office space)</td>
<td>$12.0</td>
<td>$12.0</td>
<td>$12.0</td>
</tr>
<tr>
<td>In-kind (Government of Alberta secondment)</td>
<td>$90.0</td>
<td>$90.0</td>
<td>$90.0</td>
</tr>
<tr>
<td><strong>Total revenues</strong></td>
<td>$264.0</td>
<td>$242.0</td>
<td>$255.0</td>
</tr>
</tbody>
</table>

### Surplus / deficit ('000 dollars)

<table>
<thead>
<tr>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0.0</td>
<td>$0.0</td>
<td>$0.0</td>
</tr>
</tbody>
</table>