

Building Conservation Leadership

Session 4: Project Selection: Keys to Success ***Presenters: Peg Merrens, Willis Wood, Ginny Barlow***

WORKSHOP SUMMARY

Willis Wood started off the workshop with a discussion of the Weathersfield Conservation Commission's land conservation efforts. When the CC started, they created a map using a Xerox machine and overlaying different natural resource information on a tax map. They did a survey to find out what the townspeople valued and to determine where to focus their efforts. The first people to conserve were older, long-time residents who were active in town. He stressed that you need to be patient in working with landowners, because the decision can take years. He also suggested buying land as a community, conserving it, and then re-selling the land. Another strategy is for neighbors to work together in conserving land because this can strengthen a fundraising proposal or grant.

Ginny Barlow discussed the Orange County Headwaters Project. Rising development pressures and a strong rural economy have contributed to a strong interest in conservation in the towns of Corinth and Washington, VT. Ginny discussed the group's strategy which includes targeting owners of 50 acres or more, individual outreach, and packaging multiple parcels as a conservation initiative. She emphasized keeping in touch with the Selectboard and Planning Commission. The group has done some fundraising and recently received a Wellborn grant for landowner education and a CRJC grant to do a Natural Resource Inventory.

Peg Merrens reviewed some points made in earlier workshops that apply to choosing a conservation project – the benefits of a pro-active approach to identifying conservation priorities, and building broad community support by involving people and making your process inclusive. She then described a “toolbox” of information that can be helpful in selecting conservation projects. The toolbox can include: community survey, open space plan/natural resource inventory, town plan/goals of other town groups, maps showing various natural resources and land uses, data, project evaluation forms, and studies of fiscal impacts from development. Peg then talked about considering visibility, credibility, and support when selecting projects, and emphasized that the best project may not always be the highest impact project. She then

discussed landowner privacy concerns to consider when doing outreach, and talked about how UVLT can help in this and other ways.

Jeanie McIntyre then introduced two different role plays. Both involved a conservation commissioner asking a landowner to consider conserving his/her land. While the role-plays were short, she emphasized that in reality, this takes many conversations that build upon one another.

WORKSHOP OUTLINE

Case Study: Land Conservation in Weathersfield

Presenter: Willis Wood

I. Identifying conservation priorities:

- A. Town maps: When the CC started, they had no GIS maps. Took the town tax map and overlaid various maps over it (water, natural resources, etc.), using a Xerox machine to shrink and enlarge as needed.
- B. Survey of residents: Most informative question: "What are your favorite views in town?" Easy for people to grasp importance of protecting scenic vistas (as compared with habitat, for example)
- C. Maps and survey helped to identify regions of town to focus conservation efforts.

III. Project choice

- A. People, as much as property, lead to conservation easements
- B. The first people to conserve – older people whose financial picture is clearer, more secure. Had long term associations w/ town, very involved in community. Very approachable re conservation.
- C. Knowing the property owners and what their concerns might be is very helpful.
- D. Respect people's privacy. Refer to them Land Trust for more detailed conversations about how easement might affect private family or financial issues they don't want known in the town
- E. Need to be patient, take the long view. It may take years before a landowner is ready to conserve – circumstances or needs change, land changes hands, etc.
- F. Another option – buy land as a community, conserve, then re-sell
- G. Neighbors can benefit one another and have greater conservation impact if they work together to conserve multiple parcels. Sometimes hard to get someone to go first. They want to know others will join them.
- H. Start with what's feasible and build from there.

Case Study: Orange County Headwaters Project

Presenter: Ginny Barlow

I. Introduction

- A. Project area is about 30,000 acres in Washington and Corinth. Identified 3 different zones of land use/settlement patterns within project area:
 - 1) Hurricane Ridge area – settlement in valleys around ridge, ridge undeveloped
 - 2) Washington-Corinth Highlands – remote, wild, little development
 - 3) Southeast Washington – much more settled, more farms, people love the area, rural economy still works
- B. Rising development pressure in the area from Hanover/Lebanon and Barre/Montpelier. Feel now is the time to act.

II. Beginning of Efforts

- A. A year ago, submitted application to Forest Legacy Program – federal program that buys development rights – on behalf of 9 landowners interested in conservation

- B. Received grant for \$10,000 and matched it easily with fundraising letter
- C. Found there was lots of interest in conservation in the area
- D. Group realized they needed a structure
 - got non-profit status, created a Steering Committee made up of long-time residents who know most people in town

III. Outreach Efforts

- A. Did parcel mapping for parts of Corinth in the project area
- B. Targeted landowners with 50 acres or more. Sent initial letter. 40 people came to informational meeting
- C. Individual outreach, and knowing people, is key
- D. Talking to landowners about conservation – some people get it right away, others need a lot of education and time to think about it
- E. All Steering Committee members have pledged to do easements
- F. Emphasis on working landscape – area has very good soils, productive woodlands
- G. Keep in touch with Selectboards and Planning Commissions
- H. Received grant from Wellborn Foundation for landowner education
- I. Received Connecticut River Joint Commission grant for Natural Resource Inventory

Project Selection: Keys to Success

Presenter: Peg Merrens

I. The Approach

UVLT is often asked by conservation commissions and other community groups, “Where should we focus our energies? How should we go about selecting the right project?”

- each town will have its own set of circumstances and priorities to guide the project selection process.

Themes from previous workshops apply to conservation project selection

A. Proactive vs Reactive:

- As Jack Calhoun discussed in the first workshop, your approach may be either proactive or reactive. Proactive responses provide a chance to plan and think about long-term goals. A proactive commission engages the community in dialogue about its conservation priorities and builds its relationships with other boards or groups in support of these priorities. You may find that some projects trickle -- in, perhaps a land owner makes contact with a commission out of the blue – or a situation arises that requires urgent attention. To best prepare for either situation, begin now to think about your conservation priorities. Be prepared to go into action. Build a tool box of information to help guide your decisions and priorities.
 - For example in the last workshop, Bob Norman presented the Mink Brook case study. The CC had identified the Mink Brook area as a priority and had done a feasibility study – so when presented with an opportunity to meet a fund raising match, they were better prepared to get moving.

B. Be Inclusive

- Make the process as *inclusive* as possible.

- Collect input from the community – distribute a questionnaire or conduct a community attitude survey, like the Weathersfield CC did. Hold open meetings to discuss your thoughts – all of this builds credibility.
- As we've heard in past workshops (Ginny Callan, Jack Calhoun), look ways to build broad community support for what you are doing. This will help build your credibility, and allow you to gather information about what the community as a whole values. Such information may be crucial when it comes time to asking for support from other town Boards.

II. Building a Toolbox of Information

Gathering the following information will help you identify conservation priorities. Some tools will help you make decision, others will help you explain decision

- Some of this information is quantitative/objective, some is not. Although important, the data and science-based information can also seem confining at times – be prepared to step back from all the data and to recognize the more subjective attributes of a particular conservation opportunity that may not be quantifiable.
- Some tools may be more helpful than others – pick and choose what is available in your town, or what would allow you to best make decisions about priorities.

A. Community survey/questionnaire: what views, lands, natural features to people in town value? (e.g. historic features, historic land uses - such as farming, forestry - views, recreation opportunities. In NH this is a requirement of any master plan update (community attitude survey). As with any survey, think about how you will use the responses so as to form the questions properly.

Benefit: allows individuals an opportunity to express a connection to the community; also may serve to energize the community around conservation

B. Open Space Plan/Natural Resource Inventory – completed or as a process to help evaluate options.

Benefits: develops relations with other boards; helps explain a decision in the future, boosting credibility; allows group to think strategically about priorities

C. Town Plan/Goals or Activities of other town groups – know what these are

Benefit: same as above; may enable CC to identify projects compatible with goals of other boards; may provide opportunities for cooperation or identify potential conflicts before they arise

D. Maps – from RPCs, Town Planners, Fish & Game offices, soil maps from local NRCS office – to identify water resources, wildlife habitat, trails, Class 4 or 7 roads, prime/statewide/locally significant agricultural soils, Locations of other conserved lands

Benefit: overlay information and look for trends, convergence of priorities

E. Growth and settlement data: growth rates, recent settlement patterns and locations of new housing starts or recent subdivisions, etc. -- from town offices or planner, building permits, transfer tax forms.

Benefit: Begin to identify trends; is the growth reasonable for the community or does it suggest a threat?

F. Studies of fiscal impacts of development vs conservation

-cost of community services studies (contact Dijit Taylor, Center for Land Conservation Assistance, Concord; Phil Auger, UNH Cooperative Extension)

-impact on town's tax base: privately owned conserved land still on tax rolls, often already in current use

G. Evaluation of specific potential projects

To rate conservation value of various parcels. Not an exact science, but a means of gathering information on a specific property. See Lyme CC example.

Benefit: means of focusing and selecting among options, answer the question "is this project worth investing CC Fund \$?"

People make conservation opportunities arise – that can be the driver. If you have done your toolbox analysis, you will be ready to respond when opportunities arise.

III. Selection Strategy:

Using the above tools you should be able to begin to identify particular focus regions or perhaps a half dozen to a dozen potential projects. But which project is worthy of more investment? Which project or two should the group begin with?

- Often, the most successful groups are those that are able to identify an opportunity and use it well strategically. What might begin as careful planning and science as you apply your tools – may quickly become a game of strategizing. Of the half dozen projects identified, perhaps only one or two will be fruitful and worthy of investment at this time. Select projects that can lead the way to further conservation.
- Evaluate and strategize, keeping in mind three important goals: visibility, credibility, and support

Visibility: Which project will be the most visible?

Could there be an element of public access?

Is there a sense of urgency?

Is there a threat of imminent development or other land conversion?

Credibility: Which project best meets/matches other town priorities?

Feasibility: which project has the greatest likelihood of success?

(landowner readiness is a key factor)

Is this a good use of resources?

Support: Is fundraising feasible -- does it fit potential funding criteria – state, federal, or local sources or private foundations.

Which project will likely impact the greatest number of citizens?

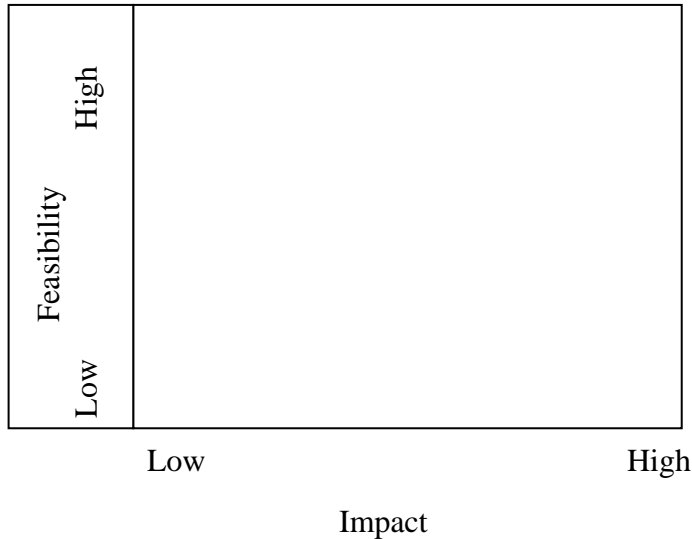
Is there a local organization, such as a land trust, willing to accept an easement on the parcel?

Other Considerations:

- Project selection is not a science. Decisions may vary by age and experience of the group. For example, a fledgling group may choose a project that will boost credibility – may not be the largest project or most visible – but with some promotion, even a small project can gain visibility. You may also may be able to grow lower impact project into

higher impact project over time by getting more landowners on board once initial project completed

- Compare impact and feasibility of various projects using an Impact/Feasibility Grid (see below). Don't wait for high-impact/high-feasibility project to come along. Be willing start with lower impact but high feasibility project to get the ball rolling.
 - For example, in earlier years UVLT focused on simpler and smaller projects; as it gained credibility and experience projects became larger, more visible and much more complex.



- A project may stall/fail for any number of reasons – most of which are beyond the control of your commission or possibly even the landowner. Keep in mind that a landowner's decision to conserve land may involve many considerations including family input, financial issues, estate planning, and other personal matters. Must be prepared to be patient and to respect the privacy of the individuals and decisions involved. Must also be prepared to fail or stall and to go back and start all over.
- This same respect for privacy is one reason that UVLT does not disclose specific information about on-going projects to anyone outside our office – even local CCs. (For this reason it's helpful to us to know hear about your conservation priorities.) Land conservation decisions are often so personal – that it would be inappropriate to release the details of a project prior to completion, unless a landowner has given us the approval to do so. Be sensitive to this when you begin your outreach.
- Activities or projects that will gain credibility for your commission or group are best based on your own local knowledge of a situation.

IV. How UVLT can help

- UVLT has experience working closely with to conserve town-owned lands and to acquire town lands for conservation

- UVLT has helped CC's coordinate neighborhood gatherings and focus discussion groups to relay information about land conservation options.
- We can follow-up with individual landowners after a local group or CC has canvassed the community – to discuss/initiate conservation projects.
 - Provide expertise in answering technical questions re conservation easements - UVLT can play an advisory role or to provide technical support in the process.
 - Some landowners may be uncomfortable talking about land conservation in anything more than a general way with someone who might be a neighbor or colleague. UVLT staff can have personal discussions with landowners who want to maintain confidentiality.
 - Feel free to introduce the concept of land conservation to a land owner, ask if they would be interested in learning more, and offer to pass along our materials, or to have one of our staff members call to set up an appointment.

V. Role plays, introduced by Jeanie McIntyre

- A. Talking about conservation easements involves same set of skills as fundraising: relationship building, cultivation, listening
- B. Role playing background: see handout
- C. Role play debriefing
 - 5 minutes is too short time a for such a conversation. Discussion of a conserving easement is usually a slow process that usually takes many conversations, each building on the last
 - felt insecure – didn't know how it all worked. As with fundraising, need to go into the conversation well prepared.
 - knowing the person helps a lot
 - in role play with younger landowner new to community: person playing landowner role was torn between wanting to do something for the community, and feeling that people might be trying to take advantage of you and grab something from you.