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**Alberta Land Trust  
Alliance**

***Business Plan***

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November 7, 2006

## Table of Contents

<b>TABLE OF CONTENTS .....</b>	<b>1</b>
<b>I. BACKGROUND INFORMATION.....</b>	<b>2</b>
<b>II. BUSINESS PLAN .....</b>	<b>3</b>
VISION .....	3
MISSION .....	3
GOALS .....	3
<b>III. GOVERNANCE.....</b>	<b>7</b>
<b>IV. BUDGET.....</b>	<b>8</b>



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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 of significant value around the province needs to be conserved before it is too late.*
- *Current land trust activity does not cover all geographic areas of the province, nor all significant values of land.*

**Goal 6:**      ***Land conservation activity in Alberta is stable, credible and sustainable.***

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

- 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.*

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

- 6.3 Establish enduring structures that will act as legal, insurance and conservation easement holding backstops for a land trust should it find itself in financial or organizational difficulty.

*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.



	Year 1	Year 2	Year 3
<b>Expenses ('000 dollars)</b>			
Operating expenses			
Accounting / legal	\$3.0	\$3.0	\$3.0
Admin support	\$20.0	\$20.0	\$20.0
Board expenses	\$7.0	\$7.0	\$7.0
Board insurance	\$5.0	\$5.0	\$5.0
Endowment	\$15.0	\$15.0	\$15.0
Equipment	\$1.0	\$1.0	\$1.0
Office support	\$2.0	\$2.0	\$2.0
Rent	\$12.0	\$12.0	\$12.0
Salary and payroll expenses	\$95.0	\$95.0	\$95.0
Training	\$5.0	\$5.0	\$5.0
Travel	\$7.0	\$7.0	\$7.0
<i>Sub-total</i>	\$172.0	\$172.0	\$172.0
Project expenses			
Awareness raising program	\$10.0	\$10.0	\$10.0
Conference / annual meeting	\$50.0	\$12.0	\$10.0
Incorporation	\$5.0	\$0.0	\$0.0
Land trust legal / insurance program	\$2.0	\$10.0	\$20.0
Research support	\$5.0	\$5.0	\$5.0
Service centre development	\$0.0	\$10.0	\$5.0
Standards and practices delivery	\$10.0	\$20.0	\$30.0
Web development / maintenance	\$10.0	\$3.0	\$3.0
<i>Sub-total</i>	\$92.0	\$70.0	\$83.0
<i>Total expenses</i>	\$264.0	\$242.0	\$255.0
<b>Revenues ('000 dollars)</b>			
Alberta Environment support	\$100.0	\$100.0	\$100.0
Other government support	\$42.0	\$8.0	\$8.0
Grants	\$10.0	\$20.0	\$30.0
Donations	\$5.0	\$5.0	\$5.0
Membership fees	\$5.0	\$5.0	\$5.0
Fee for service	\$0.0	\$2.0	\$5.0
In-kind (Government of Alberta office space)	\$12.0	\$12.0	\$12.0
In-kind (Government of Alberta secondment)	\$90.0	\$90.0	\$90.0
<i>Total revenues</i>	\$264.0	\$242.0	\$255.0
<b>Surplus / deficit ('000 dollars)</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$0.0</b>