

Alberta Land Trust Alliance (ALTA) Training Development Plan and Report

This training development plan will guide the training programs and services offered by the ALTA to members, land trusts and supporters.

I. Background

The ALTA Board of Directors met in the summer of 2008 and developed an Implementation Plan 2008-2010 to prioritize and set timelines for goals and activities identified in the ALTA's 2006 Business Plan. One of the prioritized strategies was the need to develop a training program and the first step towards this was to develop a training plan. Below is the excerpt from the ALTA Implementation Plan:

Strategy 1.3	Develop a training program.
Action 1.3.1	Create a training development plan that includes standardized training modules and a process for referrals for customized training
	<i>Priority and Target Completion: Urgent – December 08</i>
Action 1.3.2	Implement an annual workshop/conference
	<i>Priority and Target Completion: Urgent – March 09</i>
Action 1.3.3	Develop a standardized training program that could include on-line or printed modules
	Standardized training modules might include
	<ul style="list-style-type: none">▪ orientation for landowners,▪ assessment of applications;▪ contracts;▪ tax;▪ revenue development;▪ volunteer development;▪ projects;▪ legal;▪ government programs;▪ standards and practices; and▪ “Land Trusts 101”.
	<i>Priority and Target Completion: Beneficial – 2010</i>
	<i>*taken from the ALTA Implementation Plan 2008-2010</i>

II. Method

A scan of the websites of the Land Trust Alliance of British Columbia (LTABC), the Ontario Land Trust Alliance (OLTA), the Canadian Land Trust Alliance (CLTA) and the Land Trust Alliance (LTA) in the United States was conducted to determine what types of training they offer. The Quebec Alliance was not scanned because their information is only available in French. A summary table of most of their training programs and products is listed in Appendix A.

An analysis of the information in Appendix A showed that the Alliances offer similar services, training and/or products in 17 areas. Below is a summary of what the Alliances offer as well as recommendations for the ALTA. These recommendations also take into consideration the results of a mini communication

audit that was conducted for the ALTA in November 2008. The audit is further outlined under III: Mini Communication Audit below.

1) *Annual conferences*-all the Alliances have annual conferences to provide training and networking opportunities. In addition, the LTABC also offers baseline inventory workshops at a reduced rate to its members, the OLTA has held regional workshops (up to 3 per year) and the LTA has regional conferences in the SE, NE and Midwest.

ALTA Recommendation: The ALTA had a 2 day workshop in 2008, is hosting a 3 day conference in 2009 and is working on a joint conference in 2010 with the CLTA (tentative for Sept. 29-Oct. 2, 2010 at the Banff Centre in Banff, AB). It is recommended that the ALTA continue to host annual conferences for its members and Alberta's land trust community and collect evaluation forms from attendees at each conference to help determine the next conference's program. In addition, it is recommended that the ALTA offer 1 to 2 customized workshops/year on topics that their members request (eg. Board development, organizational assessment, fund-raising). The recommended process for customized training is to select 3 topics from suggestions on the annual conference's evaluation form and ask the ALTA members to choose which topic they would like to receive customized training in. The topic that receives the most votes could be designed as a customized workshop and be presented in 1 to 2 areas of the Province.

2) *Standards and Practices Information and Organizational Assessment*-besides the LTA which has a Standards & Practices Curriculum with 15 courses, the other Alliances follow the CLTA Standards and Practices. The LTABC also has a CD with over 600 templates outlining best practices that were compiled from examples provided by BC land trusts. In addition, all Alliances but the LTABC have an "Assessing Your Organization" Program that compliments their Standards and Practices.

ALTA Recommendation: The ALTA board through a board motion on December 5, 2008, accepted the CLTA's Standards and Practices and became a CLTA member. It is recommended that in coordination with the CLTA, the ALTA offer a workshop to Alberta's land trusts to go over the CLTA Standards and Practices and to conduct an organizational assessment with interested organizations based on the Standards and Practices. In addition the ALTA should develop a method to measure the success of land trusts; this could include # of acres, # of projects, quality of projects (e.g. largest piece of native grassland left in Alberta), use of best management practices, etc. This could be cross referenced to the LTA's accreditation process and help to build and/or increase credibility for Alberta's land trusts.

3) *Evaluating and Selecting Conservation Projects Information*-all the Alliances have information available either through draft assessment forms (OLTA), information on Best Practices (LTABC) and through Standards and Practices (CLTA & LTA). In addition, the LTA offers courses titled "Evaluating and Selecting Conservation Projects" and "Strategic Conservation Planning".

ALTA Recommendation: As part of the annual conference, offer a workshop on how to select conservation projects and how to do conservation planning. In addition, fact sheets should be developed and hosted on the ALTA website; they should be downloadable.

4) *Board Development and Accountability Information*-all Alliances address this on their websites with the LTABC giving referrals to consultants, OLTA having a sample board member agreement and rolling calendar, LTA having a course titled "Land Trust Boards: Preparing for Perpetuity" and CLTA addressing this in their Standards and Practices under Standard #3.

ALTA Recommendation: The ALTA board and staff participated in a Board Development Workshop in December 2008 as part of a Board Retreat. This workshop was free of charge and was facilitated by Alberta's Board Development Workshop Program. It is recommended that the ALTA organize a Board Development Workshop for board members and staff of all of Alberta's land trusts. If all land trusts can attend one workshop per year or every two years, that is preferred, yet due to geographic locations, two workshops may be needed.

5) *Conservation Easement Information*-all Alliances have information available on CE's. LTABC has brochures and a report, OLTA and CLTA include a definition of a CE on their website and the LTA has a course titled "Conservation Easement Drafting and Documentation".

ALTA Recommendation: A fact sheet should be developed to explain what a CE is and what's involved in doing a CE and be downloadable from the website.

6) *Legal Information*-all Alliances provide legal information with the LTABC referring to legal consultants, OLTA having a Best Practices and Performance Measures for CE Programs, the LTA having courses and running workshops and the CLTA addressing this in their Standards and Practices.

ALTA Recommendations: Possible violations of conservation easements are of concern and in many instances stop a land trust from using this tool. The ALTA should 1) provide and update information on their website about the number of CE violations in Canada, 2) have a ½ day workshop on how to draft a CE document to minimize litigation (could coordinate with an annual conference or be held separately), 3) provide technical support (use of a retained lawyer, accountant, appraiser) as per the ALTA 2006 business plan Strategy 2.3, and 4) provide a list of conservation professionals (lawyers, appraisers, accountants, financial planners) on its website.

7) *Tax Information*-all Alliances make mention of tax implications with the LTABC and LTA having brochures, the CLTA dealing with this within their Standards and Practices (Standard #10) and the LTA offering a course titled "Tax Benefits and Appraisals of Conservation Projects".

ALTA Recommendation: The ALTA develops a fact sheet outlining the tax implications of conservation easements and land donations and list websites for the Canadian Revenue Agency and the Ecological Gifts Program. These should be downloadable from the website.

8) *Stewardship Information*-all Alliances provide stewardship information either through courses (LTA), workshops (LTABC), facts sheets and templates (LTABC, OLTA and LTA) and/or through their Standards and Practices (CLTA).

ALTA Recommendations: It is recommended that the ALTA 1) create a stewardship training module and associated fact sheets that include guidelines for creating a baseline report, property monitoring, best practices for land management and endowments (how to set one up, who could help with the set-up and how much is necessary), 2) Provide information on how to set up an endowment fund that provides funding for stewardship costs and 3) establish consistent monitoring mechanisms to ensure conservation commitments are being respected.

9) *Volunteer Development Information*-all Alliances deal with volunteer development either through guides (LTABC), volunteer opportunities (OLTA and LTA), Standards and Practices (CLTA and LTA) or through courses (LTA-through their Standards and Practices Curriculum).

ALTA Recommendation: The Alliances except for the LTA, do not actively seek volunteers outside of their Board members. It is recommended that the ALTA work closely with Alberta land trusts to create a section on the ALTA website that outlines all the land conservation volunteer opportunities that are available in Alberta. In addition, sessions on volunteer development topics at each annual conference would be valuable.

10) *Revenue Development and Fundraising Information*-all Alliances make mention of fundraising either through referrals to fundraising consultants (LTABC), links to websites (OLTA), their Standards and Practices (CLTA) or courses (LTA-offers 4 courses).

ALTA Recommendation: Alberta's land trusts have indicated they need help with capacity building. One important aspect of capacity building is fundraising. It is recommended that the ALTA develop a revenue development module that includes fact sheets downloadable from the website on how to fundraise, who to contact, how to fill out grant applications and how to develop a fundraising plan. In addition, it is recommended that the annual conference include sessions and/or workshops that address fundraising.

11) *Financial Assistance-Grants*: All Alliances have grant programs that land trusts can apply for. The LTABC has a conservation land and appraisal assistance funds, the OLTA has the Ontario Land Trust Assistance Program and the LTA provides numerous links for grant programs available in the U.S. The CLTA does not have information on grant programs on their website yet they are working on national funding programs with Labatt's Canada and Environment Canada.

ALTA Recommendation: From the mini communication audit, the interviewees indicated that they see ALTA as an umbrella organization that has the capability to provide capacity building funding to land trusts. In addition, LTABC and OLTA are directly involved in funding programs. It is recommended that the ALTA offer as one of its services to its land trust members, the opportunity to apply for funding for capacity building activities. This compliments the Number one priority strategy in the Implementation Plan 2008-2010.

12) *Insurance Information*-all Alliances except for the CLTA have made arrangements with insurance companies for policies for land trusts. The LTA is also looking into an insurance program for legal defence of Conservation Easements.

ALTA Recommendation: Insurance such as general liability, directors and officers, property and errors and omissions can be costly if sought after by each individual land trust. It is recommended that the ALTA work with the CLTA and Provincial Alliances to investigate the potential for a national insurance program applicable for small to large land trusts. This information should be available on the ALTA website.

13) *Ethics Information*-all Alliances make mention of ethics either through their Standards and Practices (CLTA and LTA) or through a course (LTA-Avoiding Conflicts of Interest and Running an Ethical Land Trust).

ALTA Recommendation: Because the CLTA Standards and Practices deal with ethics, this could be covered when doing an organizational assessment with each land trust. In addition, information in a fact sheet should be posted and be downloadable on the ALTA website.

14) *Communication*-all Alliances have either a listserv (LTABC and LTA), provide links to listservs (OLTA), have newsletters (LTABC and CLTA) and have an "Ask the Expert" forum (LTA).

ALTA Recommendation: It is recommended that the ALTA 1) create a bi annual newsletter to inform its members of what is happening on the conservation front in Alberta; it is preferable to do this more frequently, yet due to staff resources, this would not be possible, 2) revisit the possibility of doing a listserv if resources increase, 3) provide a link to the LTABC's listserv on the ALTA website, 4) forward the CLTA and OLTA newsletters to ALTA members and 5) create a Fact Sheet that is downloadable from the website that outlines the public benefits land trusts provide and include a list of Alberta's land trusts and their contact information.

15) *Conservation Toolkits for landowners and land trusts*-all Alliances except for the CLTA have general information for landowners and land trusts that include landowner stories and videos (LTABC), how to start a land trust (LTABC and OLTA), brochures (LTABC) and courses (LTA).

ALTA Recommendation: Create a module titled "Land Conservation Toolkit" with associated fact sheets that are downloadable from the website. This would include a list of conservation tools, how to start a land trust and a Landowner's Guide to Conservation.

16) *Government Relations*-all Alliances work closely with governments to positively influence land conservation. LTABC and OLTA display letters written to government on their website, LTA has information on how to lobby government and the OLTA has a Government Relations Committee.

ALTA Recommendation: The ALTA has a Government Policy Recommendations Committee. It is recommended that this remain a standing Executive Committee that deals with suggesting policy alternatives that positively influence land conservation to governments.

17) *Technology Support Information*-the LTABC has a BC lands registry and the LTA offers technology clinics at their annual conferences as well as the Erler's LandSteward software database program.

ALTA Recommendation: The Miistakis Institute for the Rockies is in the process of developing a database where land conservation information can be shared via the internet. It is recommended that the ALTA further investigate this project and if appropriate, get involved. Also, the ALTA with the help of the Nature Conservancy of Canada, is creating a map showing where current land trusts work and a map showing where conservation projects exist. This could be further developed into a land trust conservation registry similar to the LTABC's registry.

Of all the Alliances, the LTA has the most information available on its website. This is likely because they have been around a lot longer, have more staff resources and have a much larger membership and support base than the Canadian Alliances. Special mention should be made to the LTA's on-line learning centre as well as their accreditation program and the potential for these types of products and services in Canada should be investigated with the CLTA. The LTABC and OLTA have been around for about 10 years whereas the CLTA is in its third year of operation. If the CLTA replicates the programs of the LTA, land trusts and provincial Alliances in Canada will have many valuable resources to draw from.

ALTA Recommendation: Because the CLTA is still developing its programs and services, the Alberta Land Trust Alliance should work closely with them and the other Provincial Alliances to not duplicate learning materials and to share resources. Currently, the CLTA, OLTA and the ALTA hold conference calls to update each other on programs, initiatives and special events. These calls occur every 3 to 4 months and it is recommended that these calls continue. In addition, discussions with the CLTA on developing an on-line learning centre as well as an accreditation program should occur.

III. Mini Communication Audit

The ALTA conducted a mini audit with all of the Alberta Land Trusts and 6 others involved in land trust work in Alberta. From some of their responses the following was learned:

- Approximately half of the respondent's have less than 2 full time staff and have an annual operations budget less than \$500,000
- Approximately 60% of them have been in operation for greater than 10 years
- They see the ALTA as a resource for information to build awareness for land conservation, to recommend business models for land trust sustainability and as a referral agency for landowners
- They want the ALTA to provide a unified voice to government to positively influence land conservation through government policy
- Within the next 5 to 10 years they want to get more projects, increase membership, collaboration and partnerships and hope to do this by creating and implementing strategic plans, outreach programs and maintaining or building new relationships
- They want the ALTA to help create more local land trusts
- Timing is right with the Province's Land Use Framework for the ALTA to make some inroads to obtain government funding to be disbursed to land trusts for capacity
- Want the ALTA to develop funding programs for its members to build their member's capacity.

The above information suggests that the interviewees want the ALTA to help them build their capacity to deliver land conservation programs by increasing awareness, providing funding, suggesting business models for their sustainability, positively influencing government policy decisions to support land conservation and to refer landowners interested in conservation.

The results of the communication mini audit will be used for the creation of a communications plan for the ALTA. The communications plan will be available in February 2009 and this DRAFT training plan will be cross referenced with the communication plan to ensure it adequately meets the ALTA's member's needs.

IV. Training Development Plan

Based on the scan of the Alliance's on-line information, review of the ALTA Implementation Plan 2008-2010, current ALTA human and financial resources and the ALTA communication mini audit, a DRAFT training plan has been developed (see Table One). It will require Board review and approval and additional funds.

For the 2009/10 fiscal year, the cost of recommended training items is estimated to be \$21,000. The 2008-10 Implementation Plan identifies \$15,000 for the annual conference. The additional items, 1 customized workshop and costs associated with a bi-annual newsletter are \$6,000 and would have to be fund-raised for.

For the 2010/11 fiscal year, the cost of recommended training items is estimated to be \$55,500.00. Five Training modules: Land Conservation Toolkit, Revenue Development, Stewardship, Evaluating and Selecting Conservation Projects and Success for Land Trusts are estimated to cost approximately \$17,500 and due to limited ALTA staff resources, would need to be completed by a consultant. The 2008-2010 Implementation plan indicated the need to fundraise for training modules and a funding application has been submitted to the Alberta Real Estate Foundation as part of the ALTA Community Outreach Program. If the funding application is successful, the training modules will be covered.

Other costs are associated with the annual conference, 3 customized workshop (one on Board Development, one on minimizing CE litigation and one on a topic to be identified later) a CLTA/ALTA Assessing Your Organization workshop, creating a conservation land registry and the bi-annual newsletter. \$17,000 has been earmarked and budgeted for in the 2008-10 Implementation Plan for the 2010 conference which will be held jointly with the CLTA yet the remaining items totalling \$21,000 will have to be fundraised for.

V. Summary

The training resources and products offered on the websites of the LTABC, OLTA, LTA and CLTA, the ALTA's Implementation Plan 2008-2010 and the results of a communication mini audit were analyzed to create this training development plan. Although this plan is designed for the ALTA's 2008/09 and 2009/10 fiscal years, it can be used in future years yet it is recommended that the needs of the ALTA members and a re-assessment of what the other Alliances are offering be conducted to ensure the training plan is relevant. This training plan will be cross referenced with the ALTA communication plan (will be completed by February 2009) to ensure compatibility.

The recommended training products and/or services include:

- Annual conference that includes information on volunteer development and fundraising
- Customized training on:
 - a) Board Development
 - b) Minimizing Conservation Easement litigation
 - c) A topic to be decided based on conference evaluations
 - d) Review of CLTA Standards and Practices and Assessing your organization using these standards and practices
- ALTA Website that includes areas for:
 - a) Updates on the ALTA Government Policy Recommendations Committee
 - b) Updates on CE violations and associated information
 - c) Volunteer opportunities
 - d) Bi-annual newsletter
 - e) listserv-only if ALTA resources increase
 - f) links to the CLTA, OLTA and LTABC newsletters
- Modules and/or Fact sheets on:
 - a) Evaluating and Selecting Conservation Projects
 - b) Conservation Easements
 - c) Stewardship including consistent monitoring mechanisms
 - d) Revenue Development
 - e) Running an Ethical Land Trust
 - f) Public Benefits of a Land Trust-Land Trusts 101
 - g) Land Conservation Toolkit
 - h) Success for Land Trusts
- National Insurance Program for land trusts
- Work closely with the CLTA to investigate potential of an on-line learning centre and accreditation program
- Creation and Implementation of a Financial Assistance Grant Program (s)
- Use of retained conservation professionals for land trusts
- Provide information to land trusts on how to set up an endowment for stewardship activities

- An Alberta Conservation Land Registry
- On-line database program that land trusts can use for mapping purposes-investigate Miistakis project

This DRAFT Training Development Plan will require board review approval, need to be cross referenced to the ALTA Communications Plan and will require funds in excess of what Alberta Environment provided in 2006. The ALTA will need to raise an additional \$44,500. A funding application for \$17,500 has been submitted to the Alberta Real Estate Foundation for the development of modules and if successful, will decrease the amount from \$44,500 to \$27,000.